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ABSTRACT

This case study is designed to determine the structures, actors, processes, and relationships that are involved when State government in Michigan determines policy for the public schools. The report looks at an instance of policymaking in each of the issue areas of finance, desegregation, and program improvement -- in this case, State assessment. Since developments in the finance area were extensive and needed to be covered in considerable detail, the report treats that area more fully than it does the others. Background data include the many documents available in the State and related studies done by other scholars. In addition, 39 formal interviews with policy actors were conducted, and a number of other informal interviews were conducted with other informants. For the most part, these data were collected in 1972 and early 1973 with some updating in 1974, particularly in the finance area. (Author)

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STATE POLICY MAKING FOR THE PUBLIC SCHOOLS OF MICHIGAN

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This report is one of twelve case studies growing out of the Educational Governance Project. In addition, two major reports, a comparative analysis across states and an explication of alternative models of state governance of education, are in preparation. The Governance Project began in January, 1972 and is to be completed in August, 1974. The work was funded by the U.S. Office of Education under Title V (Section 505) of the Elementary and Secondary Education Act (OEG-0-73-0499). The Policy Board for the Project was composed of three chief state school officers: Martin W. Essex of Ohio, Jack P. Nix of Georgia, and Ewald B. Nyquist of New York, with the State of Ohio serving as fiscal agent. An Advisory Committee composed of eleven persons concerned with general and educational governance also served the Project. Contract for the work was let to the College of Education, The Ohio State University and Roald F. Campbell and Tim L. Mazzoni, Jr. were the directors.

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June, 1974

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INTRODUCTION

This case study is designed to determine the structures, actors, processes, and relationships that are involved when state government in Michigan determines policy for the public schools. Initially, it was decided to look at an instance of policy making in each of four issue areas: finance, certification, desegregation, and a program improvement area, in this case state assessment. As it turned out developments in the finance area were extensive and needed to be covered in considerable detail. On the other hand, recent activities in the certification area were relatively few in number, largely given to proposals, and represented little by way of policy enactment. We thus decided to treat finance rather fully, give attention to desegregation and assessment, and drop consideration of certification altogether. We suspect the decision to drop certification represents some loss by way of range of actors, particularly those in education, in the total policy process for education. However, in Michigan that loss may be largely compensated by the participation of education actors in the assessment area.

Background data included the collection of many documents available in the state and a review of related studies done by other scholars. In addition, 39 formal interviews with policy actors were conducted and a number of other informal interviews were had with other informants. For the most part, these data were collected in 1972 and early 1973 with some updating in 1974, particularly in the finance area.

The basic interviews were conducted by JAlan Aufderheide, Floyd Horton, Linda Moffatt, and Tim L. Mazzoni, Jr. Mr. Horton initially intended to

organize the data and write the report. When he found it necessary to leave the Project for another position, the writing was divided as follows:

Section I:	Edward R. Hines
Section II:	Edward R. Hines
Section III:	Peggy M. Siegel
Section IV:	William E. Smith
Section V:	Linda C. Moffatt
Section VI:	JAlan Aufderheide
Section VII:	Edward R. Hines

Mr. Hines also assisted Roald F. Campbell and Dr. Mazzoni in the editing of the report.

SECTION I

THE SOCIOECONOMIC AND POLITICAL CONTEXT OF MICHIGAN

Nearly four decades ago, the state of Michigan celebrated the centennial of its statehood. The observance had to be extended over a three-year period, because President Andrew Jackson had not signed the bill making Michigan a state until nearly three years after Michigan's formation of a state government. This curious situation developed as a result of the so-called "Toledo War," a lingering border feud between Ohio and Michigan regarding the state in which the port of Toledo would be located.[1] While Toledo and the mouth of the Maumee River went to Ohio, in the end the state of Michigan may have triumphed because it received the vast tract of land forming the greater portion of the Upper Peninsula.

The ten million acres of the sandy soil and swampland of the Upper Peninsula helped to give Michigan some of its geographic uniqueness. The Wolverine State, with 3,121 miles of coastline, had a more extensive shoreline than all other states until Alaska became a state.[2] While agriculturally barren, the Upper Peninsula proved to be a real bargain for Michigan due to forests of soft and hard wood, and extensive copper and iron ore deposits. The first major mining boom in the United States was in Michigan's Copper Country in the mid-1800s, and during the period from the termination of the Civil War until midway in the 20th Century, the Marquette, Menominee, and Gogebic Ranges gave the nation nearly one billion tons of iron ore.[3] While the mineral riches of Michigan's Upper Peninsula are now largely history, its vigorous climate and clean expanses became the basis for a new recreational industry for the state. The completion of the four-lane suspension bridge across the Straits of Mackinac in 1957, once considered an engineering impossibility, gave new life to the sparsely-populated Upper Peninsula, but

even during the 1800s it was evident that this area had promise for a vacation paradise. Writing from Mackinac Island in 1857, the famous educator from the Northeast, Horace Mann, attested to Michigan's vacation possibilities, "I never breathed such air before, and this must be some that was clear out of Eden, and did not get cursed."[4]

Geographically, Michigan is an atypical state because it includes two distinct peninsulas. Michigan also has a third distinct region located in the southeastern portion of the Lower Peninsula. Rather than a uniqueness based upon geography, this southeastern section is heavily populated and urbanized and, in fact, contains nearly 75 per cent of the entire population of the state. With Detroit, Michigan's largest city, as well as most of the other large cities in the state, this southeastern triangle of Michigan contains many of the state's problems and promise. Detroit's teeming ghettos are but a few miles from the Grosse Points which are among the nation's most prestigious residential communities. Two of the nation's top twenty higher educational institutions in full-time enrollment, namely the University of Michigan and Wayne State University, are located within this southeastern portion of the Wolverine State. In elementary and secondary education, the Detroit metropolitan area has presented special problems in the areas of school desegregation, school district reorganization, and prolonged teacher strikes. Before considering some of these critical issues, the social, economic, and political background of Michigan will be reviewed.

Social Characteristics

Michigan is a state with a rich heritage. One scholar recently wrote:

> The French voyageurs, missionaries, and empire builders were the first Europeans to come to this part of the country, at that time thinly populated by both Algonquin and Iroquois Indians. In due time the British replaced the French, and

> for a short time the Spanish flag flew over one of the forts. The early American settlers included a preponderance of Yankees from western New York and New England. Their influence was felt in the names of cities and towns, and in the leadership Michigan gave in the field of public education.[5]

By no means has Michigan's heritage been limited to immigrants from Western Europe and emigrants from America's Northeast. As Table 1 indicates, a larger per cent of Michigan's population is foreign-born or of mixed parentage than either the East North Central Region or the country as a whole. Table 2 shows that of Michigan's foreign-born population, considerable numbers came from other countries in Europe, Scandinavia, and Asia. Many of the Cornish, Italians, and Scandinavians came to work in the mines and lumber camps. The Dutch, Germans, and Irish tended to settle in the cities and fertile agricultural areas in southern Michigan. During the first two decades of the 20th Century, the booming automobile industry in the Detroit area attracted many people from eastern and southern Europe.

TABLE 1

SELECTED CHARACTERISTICS OF HERITAGE: STATE, REGION, AND NATIONAL

Category	Michigan	East North Central Region*	United States
Per cent Foreign Born	4.8	3.9	4.7
Native Population, Per cent with Foreign or Mixed Parentage	14.2	11.7	11.8
Total	19.0	15.6	16.5

*Ohio, Indiana, Illinois, Michigan, and Wisconsin
SOURCE: 1970 Census of Population: United States Summary: General, Social and Economic Characteristics.

In 1970 the population of the Wolverine State was 8,875,068 ranking it seventh most populated of all states.[6] In the two years following the census, Michigan gained 2.3 per cent in population ranking it 31st and below the United States average of 2.5 per cent population increase.[7] The current ebb in population increase reflects a general decline in birth rates. The

TABLE 2

COUNTRY OF BIRTH OF THE FOREIGN BORN POPULATION IN MICHIGAN

Country	Percentage
United Kingdom	10.6
Poland	10.0
Austria, Czechoslovakia, Hungary, and Yugoslavia	8.3
Germany	8.2
Italy	7.5
Lithuania and Soviet Union	5.0
Netherlands	3.6
Denmark, Norway, and Sweden	2.0

SOURCE: 1970 Census of Population: United States Summary: General, Social, and Economic Characteristics.

preceding decade told a very different story particularly in the nature of Michigan's total population gain from 1960 to 1970 of 13.4 per cent, ranking the state 20th in growth among all states and just above the United States average of 13.3 per cent.[8] This increase was evident especially in cities and suburbs; there was a white population out migration from the cities into the suburbs and an increase in black population in the cities. Table 3 shows the ten Standard Metropolitan Statistical Areas which include Michigan's ten largest cities. In 1970 non-whites were over ten per cent of the population in Detroit, Saginaw, Flint, and Muskegon. The percentage increase in population, from 1960 to 1970, in these ten cities shows a white increase but a much larger non-white population increase. In the case of Muskegon, the non-white population increase during that decade was over fifteen times greater than the white population increase.

Further analysis of population increases, as indicated in Table 4, deals with the central cities in the ten largest urban areas as well as the

TABLE 3

COMPARISON OF THE POPULATION INCREASE, 1960 to 1970, and PER CENT OF NONWHITE POPULATION IN THE STANDARD METROPOLITAN STATISTICAL AREAS IN MICHIGAN

S.M.S.A.*	Per Cent Nonwhite Population, 1970	Percentage Increase 1960 to 1970		
		Nonwhite	White	Total Population
Ann Arbor	8.9	58.4	33.8	35.8
Bay City	1.0	63.4	9.2	9.6
Detroit	18.6	37.6	7.0	11.6
Flint	12.6	69.2	28.7	19.3
Grand Rapids	4.8	69.0	47.5	16.7
Jackson	6.3	21.3	7.8	8.5
Kalamazoo	5.3	74.8	16.6	18.8
Lansing	4.6	105.6	24.2	26.6
Muskegon - Muskegon Hts.	11.1	34.2	2.2	5.0
Saginaw	12.8	47.7	11.6	15.2
Average Increase		58.1	18.9	16.7

*A Standard Metropolitan Statistical Area is a county or group of contiguous counties which contains at least one city of 50,000 or more, or two adjacent cities with a combined population of at least 50,000.

SOURCE: 1970 Census of Population as quoted by Daniel H. Kruger, "The Socio-economic Indicators of Michigan--Implications for Education." Equal Educational Opportunity, U.S. Government Printing Office, Washington, 1972.

suburbs around each city. From 1960 to 1970, there was a total population decline in six of these ten cities and a white population decline in seven of the cities. During the same period the nonwhite population increased in all ten cities, and was over 100 per cent in Ann Arbor, as well as over 50 per cent in six other cities. The nonwhite population in the ten central cities in 1970 exceeded ten per cent in eight of the ten cities. There can be no doubt that these ten cities have become areas with a great increase in nonwhite population growth in recent years.

Accompanying these population growth figures is the exodus from the cities to the suburbs by the white population. Table 4 provides graphic illustration of the extent to which the white population has shifted into the suburbs.

TABLE 4

SELECTED STATISTICS INDICATING POPULATION INCREASE 1960 TO 1970, AND WHITE AND NONWHITE COMPOSITION OF THE CENTRAL CITIES[1] AND SUBURBS[2] WITHIN THE TEN STANDARD METROPOLITAN STATISTICAL AREAS IN MICHIGAN

Area	Central City Population Increase 1960 to 1970 Total	White	Non-White	Central City Nonwhite Population 1970	Suburbs Percentage Nonwhite 1970	Suburbs Percentage White 1970
Ann Arbor	48.2	44.2	105.1	9.0	11.8	88.2
Bay City	- 9.3	-10.0	51.1	1.8	.5	99.5
Detroit	- 9.5	-29.0	39.7	44.5	4.2	95.8
Flint	- 1.8	-14.8	58.6	28.6	4.3	95.7
Grand Rapids	11.5	33.1	61.1	12.0	.7	99.3
Jackson	-10.3	-14.8	34.0	13.9	.4	99.6
Kalamazoo	4.2	- .1	64.9	10.6	1.3	98.7
Lansing	22.0	17.3	89.6	10.1	3.4	96.6
Muskegon-Muskegon Heights	- 4.0	-11.1	75.6	15.0	15.8	84.2
Saginaw	- 6.5	-15.5	37.4	25.0	8.2	91.8
Average Increase	4.5	.1	61.7			

[1]Central cities constitute the urban areas within the Standard Metropolitan Statistical Areas.

[2]Suburban populations were derived by subtracting the populations of the central cities from the total population of the S.M.S.A.'s.

SOURCE: 1970 Census of Population as quoted by Daniel H. Kruger. "The Socio-Economic Indicators of Michigan--Implications for Education." Equal Educational Opportunity, U.S. Government Printing Office, Washington, 1972.

Table 5 summarizes the population distribution in Michigan according to urban and rural residence. Overwhelmingly, blacks and persons of Spanish heritage tend to reside in urban areas. The total population of the state is 73.9 per cent urban, ranking Michigan 17th among all states and just above the United States average urban population of 73.5 per cent.[9]

TABLE 5

RACE BY URBAN AND RURAL RESIDENCE FOR MICHIGAN, THE EAST NORTH CENTRAL REGION, AND THE UNITED STATES

Category	Per Cent Urban	Per Cent Rural, Non-farm	Per Cent Rural Farm
Black	96.9	3.9	.2
Persons of Spanish Heritage	80.8	16.9	2.3
Total Population, Michigan	73.9	21.7	4.4
Total Population, East North Central Region	74.7	19.4	5.8
Total Population, United States	73.5	21.3	5.2

SOURCE: 1970 Census of Population: United States Summary: General, Social and Economic Characteristics

Economic Characteristics

The Wolverine State has a number of firsts which have contributed to its economy. Michigan is the nation's largest salt supplier, has the greatest production of beans, tart cherries, and hothouse rhubarb, and one company near Detroit can boast of being the world's largest manufacturer of toilet seats.[10] Such landmarks as the magnificent Grand Hotel on Mackinac Island, allegedly having the longest porch on earth, and the suburban splendor of the Grosse Pointes have brought national recognition to the state. Other, less desirable accomplishments included the 1967 Detroit race riot, the largest in national history; the fifth largest city in the land having vast urban blight; and a latent statewide potential which caused one writer to comment "When all is said and done with Michigan, the whole may be something less than the sum of the parts."[11]

When one thinks of Michigan and especially of Detroit, one dominant industry comes to mind. The income of the General Motors Corporation is not only three times the size of any state budget, but also is larger than any nation's budget except for the Soviet Union and the United States.[12] The assembly lines of the "Big Three," in addition to other automotive manufacturers, have attracted masses of laborers. Michigan has the most powerful labor movement of all the states; one out of every 17 union members in the country resides in Michigan.[13] The auto industry has spawned

such managerial giants as Henry and Edsel Ford, Charles Wilson and George Romney, some of whom went on to political accomplishments at both state and national levels. The labor movement has included such figures as Walter Reuther and Leonard Woodock of the United Auto Workers, and James Hoffa of the Teamsters.

The 1970 Census showed that Michigan ranked 11th of all states with $11,032 in median income per family and ranked 12th in per capita personal income with $4,059.[14] In terms of individual economic growth, statistics portray a less attractive view. In per cent increase in per capita personal income, 1960 to 1970, Michigan ranked 30th among the states with 74.7 per cent increase. In per cent increase in per capita disposable personal income, 1965 to 1968, Michigan ranked 47th with 16.2 per cent which was considerably below the United States average of 20.7 per cent.[15]

Considering some broad categories of occupations, Table 6 reveals that Michigan has a lower percentage of white collar workers and farm workers than the national average, about the same percentage of service workers, but a higher percentage of blue collar workers. Undoubtedly these developments have resulted from Michigan's industrial heritage with the employment of so many individuals who could be classified as blue collar.

TABLE 6

EMPLOYED PERSONS BY BROAD OCCUPATION GROUPS, STATE AND NATIONAL
(IN PER CENT)

Category	Michigan	United States
White Collar Workers	44.9	48.2
Blue Collar Workers	40.8	35.9
Farm Workers	1.5	3.1
Service Workers	12.9	12.8

SOURCE: 1970 Census of Population: United States Summary: General, Social, and Economic Characteristics.

In looking at growth, again a different perspective emerges. In Table 7, it is evident that in Michigan's traditional blue collar industries, for instance mining and the auto industry, there has been a slower rate of growth than in other sectors of Michigan's economy. The mining industry even suffered a negative growth pattern from 1960 to 1970. Compared to other Michigan industries, the production of automobiles and related equipment did not fare well. Another way of looking at this situation is to note that in 1960, 51.5 per cent of all non-farm employees in Michigan were in manufacturing industries. Ten years later that percentage had declined to 45.8 per cent.[16] As a result, unemployment rates in Michigan have increased annually from 3.9 per cent in 1965 to 7.0 per cent in 1970.[17] Admittedly, the nation was experiencing the effects of a general recession in 1970, but considering the ten-year growth cycle from 1960 to 1970, the state of Michigan's economy appears less than bright.

TABLE 7

CHANGES IN MICHIGAN'S WAGE AND SALARY WORKERS BY INDUSTRY, 1960 TO 1970

Category	Per Cent Change 1960 to 1970
Total Manufacturing	11.4
Motor Vehicles and Equipment	8.6
Total Non-manufacturing	36.7
Transportation, Communication, and Utilities	6.7
Wholesale Trade	37.4
Retail Trade	33.7
Finance, Real Estate, and Insurance	43.7
Services	62.0
Mining	- 22.5
Total Government	55.0

SOURCE: Economic Report of Michigan's Governor, 1971, as quoted by Daniel H. Kruger, op. cit.

Another view of Michigan's employment in selected industries, as shown in Table 8, demonstrates the considerable extent to which the state's

workers are in manufacturing, a proportion higher than the national average by fully 10 per cent. On the other hand, Michigan has fewer workers than the national averages in other sectors of the economy, including wholesale and retail trading, banking and credit agencies, as well as other financial institutions.

TABLE 8

EMPLOYED PERSONS BY SELECTED INDUSTRIES, STATE AND NATIONAL (IN PER CENT)

Category	Michigan	United States
Agriculture, Forestry, and Fisheries	1.8	3.7
Manufacturing	35.9	25.9
Wholesale and Retail Trade	19.4	20.1
Public Administration	3.8	6.5
Banking and Credit Agencies	1.5	1.7
Insurance, Real Estates, and Other Finance	2.5	3.3

SOURCE: 1970 Census of Population. United States Summary: General, Social and Economic Characteristics.

Taking the manufacturing industry, Table 9 indicates that the percentage of employed persons in Michigan exceeds the national averages in primary metal and machinery manufacturing industries. As one might expect, in manufacturing related to automobiles and transportation Michigan's employment percentage far exceeds the national average.

Table 10 demonstrates some of the areas where Michigan's economy can be seen in its extremes. While the state exceeds the regional and national percentages in such categories as median family income, families with income greater than $15,000 annually, and fewer Michigan families with incomes less than poverty level, other statistics do not give an optimistic view. The higher unemployment rate in Michigan is reflected in the nonworker-ratio, per cent civilian labor force unemployed, and the per cent working 50 to 52

TABLE 9

DISTRIBUTION OF EMPLOYED PERSONS BY SELECTED OCCUPATION IN MANUFACTURING, STATE, REGION, AND NATIONAL, 1970 (IN PER CENT)

Category	Michigan	United States
Primary Metal Industries	2.8	1.9
Machinery Excepting Electrical	5.0	2.6
Motor Vehicles and Transportation Equipment	14.0	2.8
Food and Kindred Products	1.3	1.8
Textile Mill and Other Fabricated Textile Products	0.4	2.9
Printing, Publishing, and Allied Industries	1.2	1.6

SOURCE: 1970 Census of Population: United States Summary: General, Social and Economic Characteristics

TABLE 10

SELECTED ECONOMIC CHARACTERISTICS, STATE, REGION, AND NATIONAL

Category	Michigan	East North Central Region	United States
Nonworker-worker Ratio	1.52	1.45	1.45
Civilian Labor Force, Per Cent Unemployed	5.9	4.3	4.4
1969--Per Cent working 50 to 52 weeks	54.9	57.9	58.1
Per Cent Working Outside County of Residence During Census	19.0	15.5	17.8
Median Income of Families	$11,032	$10,563	$9,590
Per Cent of Families With Income Less Than Poverty Level	7.3	7.5	10.7
Per Cent of Families With Income of $15,000 or Greater	26.7	23.5	20.6

SOURCE: 1970 Census of Population: United States Summary: General, Social and Economic Characteristics

weeks in 1969. An interesting figure is the per cent working outside county of residence, which in Michigan approaches nearly one-fifth of the working force. The fact that this statistic exceeds both regional and national averages indicates that in Michigan, more workers travel some distance to work. This

characteristic would probably reflect the industrial and manufacturing plants having seasonal production cycles and periodic layoffs in work forces.

Political Culture

Historical factors and political developments in Michigan, set against a broad social and economic context, have resulted in a particular pattern of politics in the Wolverine State. In 1854 meetings of the so-called Free Democrats, Free Whigs, and the Free Soilers took place first in Ripon, Wisconsin and then in Jackson, Michigan to protest the passage by Congress of the Kansas-Nebraska Bill which, in repealing part of the Missouri Compromise, thereby opened up the North to slavery. From such protests the Republican Party was born, and in Michigan it dominated state politics until 1932.[18]

A combination of events led to a Republican demise in 1932. One development was the strength of the Progressives as a third political force in the country early in the 20th Century. While Republican leaders yielded to the reform movement to the extent that they remained in power in Michigan until the Depression years, the Progressive ideology brought attention to instances of political malfeasance and disregard of the public welfare. A new era of citizen involvement and reform legislation was initiated in many states including Michigan. Resistance to the Republican strength in Michigan state politics increased during the early part of this century, however, and as the effects of the depression deepened Michigan voters turned to Franklin D. Roosevelt at the national level and related Democratic promises at the state level.

Since the depression years, two-party politics have been established in Michigan often with intense rivalry between the parties based on their ideological positions. Political leadership in Michigan has centered

around the record twelve years of gubernatorial control by Democrat G. Mennen Williams from 1948 to 1960, and Republican George Romney from 1963 until his departure in 1969 for a position in the federal government.

One approach to a study of political culture was suggested by Elazar who categorized political cultures as being individualistic, moralistic, or traditionalistic.[19] In the individualistic political culture, government tends to be viewed in economic terms, and political professionals motivated by winning offices for tangible rewards tend to dominate the party structures by aligning themselves with political party positions in a cohesive fashion. On the other hand, politics in the moralistic political culture is viewed as a healthy activity where commonweal interests are served through positive actions. In the moralistic political culture political party cohesiveness tends to be subordinate to issues where politicians get involved in the public interest. The existing order tends to be maintained in traditionalistic political cultures with political elites coalescing over issues as a means of preserving the governing body traditionally in power. Using this framework Elazar viewed Michigan generally as moralistic tempered by the individualistic political culture in the more populous and urban areas.

Political scientists have suggested that voter turnout will tend to be greater if political party activity is vigorous and if party competition is intense. Additional stimuli to voter turnout include the voters' evaluation of the closeness of the issue and the possible importance of their vote. Ranney measured the degree of political party competition by considering factors such as proportion of success, duration of success, and frequency of divided control. During the period 1956 through 1970, Michigan was classified as a two-party state with a slight inclination

toward modified one-party Republican.[20] Only two states, leaning toward modified one-party Republican were categorized as being a bit more two-party than Michigan, and they were Colorado and Pennsylvania. Taking original research by Zeller, Ranney grouped the states according to legislative party cohesion. Of the twenty-six states classed as having a two-party political system, Michigan and thirteen other states were categorized as having strong political party cohesion.[21] One might guess that because Michigan is a two-party state with a strong degree of political party cohesion, that voter turnout would be high. Yet Milbrath demonstrated that during the period 1952 to 1960, Michigan was ranked 25th of all states on voter turnout in gubernatorial and senatorial elections. Michigan was rated lower than Indiana, Illinois, Ohio, and Wisconsin in voter turnout, and in fact next to the border states, middle and deep South, only six states were rated lower than Michigan in voter turnout.[22] The lower degree of voter turnout would tend to be related to the individualistic more than the moralistic political culture. The years when Milbrath's study occurred were the years of Williams' Governorship. Had the examination spanned several periods when state administrations changed political hands, a higher degree of voter turnout may have been found.

The keen rivalry between Democrats and Republicans in Michigan clearly appears related to the high degree of inter-party competition in the state. Michigan's strong cohesion within the political parties would be related to a higher degree of inter-party competition as well as the individualistic political culture.

Another aspect of the state's political culture is an innovation measure developed by Walker who ranked the states according to the degree to which new policies were being adopted. Of the total of 88 indicators,

several policy measures were related to education including education agencies, educational television, teacher certification, and the state superintendent. On a composite innovation scale, Michigan ranked 5th behind New York, Massachusetts, California, and New Jersey.[23] In creating new state government and service programs, then, Michigan may be considered as one of the most innovative states in the union.

Michigan's capability of creating innovative programs in state government has resulted from strong gubernatorial leadership and the battles won by intense political competition among the two parties. The Democratic vote in the state tends to come from Detroit and a number of communities in surrounding Wayne County. Several counties in the western section of the Upper Peninsula usually can be counted on to vote Democratic. The G.O.P. appears to have a firm hold in most of the rural and small-city counties of the Lower Peninsula. Republicans win handily in the prosperous Detroit suburbs and have demonstrated strength in most of the state's second-ranking cities in the Lower Peninsula.

Several events of the 20th Century undoubtedly were related to the rise of the Democratic party. The Progressive movement with its inherent suspicion of big-business leadership and political domination gave support to the beginnings of Democratic strength in the 1930s. The rise of the trade union movement had close ties with politics. One might conjecture, however, whether the massive size of the union membership and the diverse interests even within the labor sector d d not result in factionalism rather than overall unity within the Democratic party.

The Republican party is not without factionalism. Neither George Romney nor his successor and current Governor, William Milliken, tightly aligned themselves with the traditional conservative big-business interests

within the party. The Republicans made a remarkably poor showing in the 1970 elections and as a result, Democrats gained control of the House of Representatives as well as several other state offices. Governor Milliken was faced with the necessity of gaining significant bipartisan political support in wrestling with such major issues as school finance, environmental control, and the urban decay of Detroit. As we shall see, the Governor has been quite adept at gaining bipartisan support. Yet, the effect of legislative reapportionment in the mid-1960s gave increased strength to a growing conservative Republican representation in the suburbs, voices not enthusiastic about gubernatorial reform at their expense.

Frustration with Michigan's latent capability and its inability to resolve issues of increasing concern were expressed by a twenty-year veteran of state politics in the Wolverine State. He concluded that the system of checks and balances built into state government and the complexities inherent in legislative politics actually work against the state's leadership in gaining the power necessary to accept responsibility and effecting reform in government. This former politician noted that during the 1960s, three public opinion polls were taken and all indicated that the state's Democrats should be consistently winning statewide elections. Reasons for the less than consistent Democratic success included an overly demanding party control by labor, public suspicion of political promises based on lack of performance, and a complex network of factions within the party unable to unify on statewide issues. This political veteran concluded that the Governor's Office must have greater executive powers, and he recommended consideration of transforming the state legislature into the unicameral form of government.[24]

The disunity present in Michigan's political parties and the strongly partisan nature of the cleavages ever present over statewide issues caused one scholar to comment recently:

> Since Michigan's political culture is best characterized as fiercely partisan, where ideological doctrine is expressed and represented through party membership, even Republican Governors find it difficult to gain support for public policy proposals in disagreement with the conventional doctrine of their own party. Differences in Democratic and Republican value preferences on almost any issue consistently present each Michigan voter with options related directly to the party ideology of his choice. This condition of ideological cleavage between the two parties has made it less ambiguous and evasive for the local citizen, especially the partisan, to reach personal conclusions on policy proposals, including state educational policies. Thus, the citizen and his state representative may channel their interests and private attitudes toward different policies through the political party structure.[25]

Detroit--A Special Case

Several states have one city far exceeding in size other cities in the state. Boston, New York City, Chicago, Miami, Denver, and other examples are illustrative. Detroit, Michigan has been a bit different for several reasons. As early as 1870 Detroit's population exceeded by five times the population of Grand Rapids, the state's second largest city. One hundred years later Detroit was nearly eight times larger than Grand Rapids even though Detroit's population declined by over 150,000 from 1960 to 1970. Table 4 showed Detroit's internal population shifts from 1960 to 1970 with a 29 per cent white decrease in the central city and nearly a 40 per cent nonwhite population increase.

More than population figures, Detroit has symbolized the birth and growth of the auto industry and the inception and rise of the labor and trade union movement, so important in American history. Detroit also has been a focus for the eruption of racial hatred which, in other cities, may lie largely dormant. Reflecting on Detroit's confusing physical layout, industrial eyesores, riot renaissance architecture, poor transportation system, and impotent civic leadership, one recent writer proclaimed Detroit as "a dying city, uncertain about its future and viability."[26]

Another author commented on the tumultuous history of Detroit including the legacy of the Ku Klux Klan, the tyranny of the auto industry, the growth of radicalism during the Depression, and the recent failure of the power elite in Detroit to lead the city into an era of post-riot reconstruction.[27] Giving further testimony to Detroit's present condition, this writer continued:

> Now the major traffic consists of white middle-class suburbanites driving early in the morning into the city's downtown commercial center and inching their way out of the city before darkness sets in. The bright, newly built commercial buildings in downtown Detroit stick out like shining thumbs amid parking lots, expressways, and vacant land ... There are large areas of wasteland within the city limits proper ... For every new business moving into the city, two more move out. There are over 7,000 vacant store fronts ... Racial and class tensions in the 1970s are bound to occur within this framework.[28]

Unlike other cities such as Newark and Chicago, Widick saw the possibility of the unions and blacks in Detroit forming a powerful socioeconomic force, and as the fifth largest city in the nation, Detroit may hold the potential for becoming the largest black metropolis in the world. Detroit may be standing at a crossroad. If sufficient coalitions can let the value of a community goal surpass parochial interests and the philosophy of ethnic separation, Detroit could become a model for other cities having large nonwhite populations. If past history is an indicator of the inability of factions to unify toward common goals, the immediate future will hold only further polarization and unrealized objectives for the residents of the Motor City.

Schools have not escaped the turmoil of Detroit's recent history. If anything, Detroit's schools serve as a monument to racial differences and dissatisfied factions within the community. Pronouncing the public schools a disaster, the Detroit High School Study Commission epitomized the current state of affairs by saying "our high schools are appallingly inadequate--a disgrace to the community and a tragedy to the thousands

of young men and women whom we compel and cajole to sit in them."[29] One authority remarked "The school system no longer attracts people to Detroit; it is a reason for their not coming to the city."[30] With a declining tax base and inadequate income, the city's fiscal resources have become increasingly inadequate. The Board of Education has symbolized the crisis in the schools with conflicts involving race, religion, geography, reorganization, and the ever-present fiscal dilemma.

The recent report of The Detroit Study of Priority Elementary School Problems and Concerns cited two major priorities for the Detroit elementary schools.[31] One priority was the achievement of responsible autonomy which the study group defined as achieving a balance between accountability and freedom in all parts of the educational system. The thrust of the effort would be at the local school level because the problems of motivation, curricular relevancy, humaneness, and resource allocation were seen to be most critical at the grass-roots level. The second major priority was that of improving relationships among people, specifically among students, paraprofessionals, custodians, teachers, administrators, and parents. In the attainment of these lofty goals, a balance of power was considered to be important for the relationships among local schools, the regional educational boards, and the Central Board of Education. Continued racial tensions, an enduring teachers' strike in 1973, and a shortage of funds have not enabled these objectives to be achieved.

Responding to many of these problems, the Detroit Board of Education in January, 1973 created a fifty-seven member citizens task force to work with the Board of Education and school officials on critical education issues. The problem solving philosophy of the task force is unique. Recommendations are forwarded to the board one at a time. This serial

approach avoids the submission of a final report which can paralyze public bodies and render such studies useless. The task force has focused on problems of finance and management, and learning outcomes, reporting publicly each month to the board. Implementation of recommendations is the highest priority. Several serious problems have been resolved with task force help. For the past year Luvern L. Cunningham, on leave from Ohio State University, has served as the executive officer of the task force.

It would appear that Detroit's educational problems have been symptomatic of many other unresolved social problems within the larger community. The manifestations of Detroit's educational ills seem to represent the extreme in open conflict and hardened factionalism which, lacking the necessary leadership and community willingness for resolve, endure as a testimony to divisiveness and resistance to change.

A broader treatment of Detroit and its educational situation is beyond the scope of this report. Because of Detroit's importance in the state's politics and problems, some consideration of the Motor City becomes a part of the context in which to examine state policy making for the public schools of Michigan.

The Pattern of State Educational Politics

Based upon the evidence already presented in this report, one could surmise that the political behavior of the interest groups and state organizations supporting education in Michigan might be somewhat less than unified. Such has been the case in the state. A review of some of the writings in this area will be helpful.

An informative view of state educational politics in Michigan was provided by the 1964 report of Eliot, Masters, and Salisbury. Observing

that there was no continuous or visible decision-making pattern in formulating state policies in Michigan, the authors wrote that there tended to be an annual pattern of decision making with the outcome in doubt until the enactment of final policy decisions. Four contributing factors were cited as Michigan was contrasted with Illinois and Missouri:

> 1) Education groups making demands on the legislature were not unified.
>
> 2) Wealthy and poorer school districts displayed self-consciousness over conflicting interests because of a failure to adopt a statewide school district reorganization plan after World War II. These divisions among school districts became visible within the legislature when either school district reorganization or state aid to education was an issue.
>
> 3) A longstanding political party cleavage along ideological lines tended to become apparent in the split party control of the executive and legislative branches. Education, particularly when money was involved, tended to be cast along political party lines.
>
> 4) There appeared to be a division between public school, and parochial and private school proponents, and the division was based more along economic than religious lines.[32]

The inability of educational interest groups to align over common issues can be rather common especially in times when demands are in excess of existing revenues. The Michigan situation is compounded because the Educational Council, a loosely-knit group composed of representatives from the interest groups, has been unable to come to agreement over most of the issues of any consequence. The Superintendent of Public Instruction was popularly elected until 1963 when the new State Constitution changed the office to appointment by the State Board of Education. With a popularly elected Superintendent of Public Instruction, the activities of both the Superintendent and the State Department of Education tended to be thrust into the decision making arena of state government. In a state so typified by sharply drawn lines around partisan political issues, the Superintendent of Public Instruction had been forced to draw upon the

support of his own political party where possible. At the same time the Superintendent attempted to gain wider support for the passage of educational policies by enlisting bipartisan support. Still other pressures called for the Superintendent to rise above partisan politics to assume a statesman-like role in education. As Masters, et. al. wrote "Unlike the Governor, for instance, who is in a stronger position, it is difficult for the Superintendent to transfer his ballot box popularity into voter support for his programs in the legislature."[33]

With the adoption of a new state Constitution in 1963, Michigan also created a new State Board of Education. The new Board consists of eight members, two of whom are elected on a partisan basis every two years. The potential of this new State Board of Education to formulate educational policies for all of education was diluted considerably, according to one scholar writing in 1969, because the Board's composition appeared to favor the interests of higher education and its policies were not forcefully made or implemented in the state.[34] Another writer reflected a similar assessment of Michigan's State Board of Education in noting that partisan interests were evident in the recruitment and selection of State Board members, but in function the State Board neither gave particular support to partisan interests with any degree of continuity nor did the State Board make any strong attempt to deal with the major educational issues in the state.[35]

Two experienced state officials, one in education and one in state government, recently commented on the State Board of Education at our request. The educator said that the State Board of Education, rather than being dominated by higher education in its composition, spent too much of its time dealing with higher educational matters. The state government official

offered that in higher educational policy making the State Board of Education is considered rather ineffective.

The organizational structures linking the network of educational groups to the state legislature have been examined. Iannaccone conceptualized linkage structures in states as being locally-based disparate, statewide monolithic, statewide fragmented, or statewide syndical.[36] Of the eleven states studied, Iannaccone found Michigan to be clearly statewide fragmented in its linkage structure. The statewide educational interest groups were not united within any type of structure. As one might expect the separate groups came to the legislature more in conflict than in consensus. In considering the consequences of this statewide fragmented structure found in Michigan, Iannaccone suggested that the policy proposals made within Michigan's structure would be considered and decided within the legislative arena, rather than among the educational interest groups outside the legislative arena. Legislators were seen to consider educators on a kind of "good and bad" continuum with the classroom teachers being admired and the administrative establishment being suspect. In political life style a polyarchical form of political behavior can be found in a state like Michigan where active two-party politics are the norm. Secularized and competitive, this polyarchy political life style appears to describe Michigan rather accurately.

Two writers recently expanded on the work done by Iannaccone and suggested that the political and organizational behavior found in Michigan may represent a form closer to future developments in education than the monolithic structure. When competing educational interest groups cannot agree on common policy proposals, each group will tend to approach either the governor or the state legislature in conflict with the demands of other

groups. According to Wirt and Kirst, compromises will tend to occur after policy proposals have entered the legislative arena.[37] Clearly such interest groups do not consider themselves as being beyond or above partisan politics. As a result one may expect legislative stalemates. The authors noted that

> Michigan's political pattern has resulted from the inability of the profession to agree on common goals. Its militant teacher groups were leaders in the field of collective bargaining. As long as financial resources are increasing for everyone in large amounts, coalitions can stay together. But any redistribution of existing resources or favoritism for one group strains the coalition and enhances the role of the governor and legislature in compromising or ignoring competing claims of education groups.[38]

The pattern of state educational politics in the Wolverine State is reflective of its political culture with strong inter-party competition and competing demands based upon the ideological rationale of the contending groups. Reflecting the instability of the political turnover in state leadership, one cannot predict the outcome of policy proposals in education with any degree of certainty. Because of the intensity of the demands placed upon the state's leaders, one may find conditions leading to stalemates perhaps as often as to the enactment of new policies. Although on an innovation dimension, Michigan appears to be one of the more creative states, at the same time there seems to be an inability to resolve critical issues during a period when fiscal resources are increasingly at a premium.

One additional facet of the state's background needs examination before turning to the educational policy issue areas and their analysis. We will now review the state structure for general government and for education in Michigan.

FOOTNOTES

[1]Willis Frederick Dunbar, Michigan: A History of the Wolverine State, William B. Eerdmans Publishing Company, Grand Rapids, 2nd edition, 1970. p. 301.

[2]Neal R. Peirce, The Megastates of America: People, Politics, and Power in the Ten Great States, W. W. Norton and Company, New York, 1972, p. 403.

[3]Dunbar, op. cit., pp. 498, 503.

[4]Ibid., p. 512.

[5]Ibid., pp. 7-8.

[6]1970 Census of Population, General Social and Economic Characteristics, United States Summary, Table 140, p. 1-468.

[7]Rankings of the States, 1973, National Education Association - Research, Washington, D. C., 1973, p. 8.

[8]Rankings of the States, 1972, Research Division, National Education Association, Washington, D. C., 1972, p. 8.

[9]Ibid., p. 12.

[10]Peirce, op. cit., pp. 431, 441.

[11]Ibid., p. 449.

[12]Ibid., p. 404.

[13]Ibid., p. 413.

[14]Rankings of the States, 1972, op. cit., p. 35.

[15]Ibid., p. 37.

[16]Daniel H. Kruger, "The Socio-Economic Indicators of Michigan--Implications for Education," Hearings before the Senate Committee on Equal Educational Opportunity, United States Senate, 92nd Congress, Equal Educational Opportunity - 1971. U. S. Government Printing Office, Washington, D. C., 1972, p. 9915.

[17]Ibid., p. 9916.

[18]Dunbar, op. cit., p. 419.

[19]Daniel J. Elazar, American Federalism: A View from the States, 2nd edition, Thomas Y. Crowell Company, New York, 1972, p. 100.

[20]Austin Ranney, "Parties in State Politics," in Politics in the American States: A Comparative Analysis, 2nd edition, Herbert Jacob and Kenneth N. Vines, editors, Little, Brown and Company, Boston, 1971, p. 87.

[21]Ibid., p. 113.

[22]Lester W. Milbrath, "Individuals and Government," in Jacob and Vines, op. cit., p. 36.

[23]Jack L. Walker, "Innovation in State Politics," in Jacob and Vines, op. cit., p. 358.

[24]James M. Hare, With Malice Toward None: The Musings of a Retired Politician, Michigan State University Press, 1972, pp. 6, 193.

[25]Jay D. Scribner, "Allocating Federal Aid to Education in Michigan: The Political Context and Administrative Arrangements," University of California at Los Angeles, July 1971.

[26]Peirce, op. cit., p. 433.

[27]B. J. Widick, Detroit: City of Race and Class Violence, Quadrangle Books, Chicago, 1972.

[28]Ibid., pp. 209-210.

[29]The Detroit High School Study Commission as quoted in B. J. Widick, op. cit., pp. 214-215.

[30]Edward L. Cushman and Damon J. Keith, as quoted in B.J. Widick, op. cit., p. 215.

[31]The Detroit Study of Priority Elementary School Problems and Concerns, Priorities for the Seventies, The Board of Education of the School District of the City of Detroit, 1971.

[32]Nicholas A. Masters, Robert H. Salisbury, and Thomas H. Eliot, "Michigan: The Lack of Consensus," in The Politics of Education at the Local, State and Federal Levels, edited by Michael W. Kirst, McCutchan Publishing Corporation, Berkeley, 1970, pp. 251-252.

[33]Ibid., p. 266.

[34]Michael D. Usdan, David W. Minar, and Emanuel Hurwitz, Jr., Education and State Politics, Teachers College Press, New York, 1969, p. 91.

[35]Scribner, op. cit., p. 22.

[36]Laurence Iannaccone, "State Politics of Education," in Michael W. Kirst, op. cit., pp. 284-299.

[37]Frederick M. Wirt and Michael W. Kirst, The Political Web of American Schools, Little, Brown and Company, Boston, 1972, p. 126.

[38]Ibid.

SECTION II

THE STRUCTURE FOR EDUCATION AND STATE GOVERNMENT IN MICHIGAN

State Board of Education

Michigan's leadership in education became evident when provisions for the public support of education were made when the area was still part of the Northwest Territory, and when Michigan in 1836 became the first commonwealth having an independent department of education with a state superintendent of public instruction as its administrator.[1] The State Board of Education has shared this leadership only in part, and this condition has resulted not only from the fact that Michigan's present State Board of Education was provided for by the 1963 Constitution, but also because of the nature of its authority.

The State of Michigan has had four state constitutions, and in each constitution the state legislature was charged with the responsibility for establishing a public educational system. The constitutions of 1835, 1850, and 1908 mentioned only the common or primary schools, while the most recent constitution in 1963 dealt with a broad range of educational matters.[2] All but the first constitution made mention of a State Board of Education. The 1850 and 1908 constitutions, while providing for a State Board of Education, specified that the Board's function was in the supervision of the normal schools. Therefore, these earlier Boards were "to prescribe courses of study, issue licenses and certificates, and grant diplomas and degrees in connection with several educational institutions of the State."[3] There were other State Boards concerned with education in Michigan but the scope of their functions was also limited. These special purpose boards included the State Board of Control for Vocational Education, and elected boards for major higher educational institutions including the University

of Michigan, Michigan State University, and Wayne State University.

The creation of State Board of Education similar to broad policy-making bodies in other states was not to come in Michigan until the ratification of its fourth constitution in April 1963. The State Board of Education created by this constitution consists of eight members nominated by political party conventions, elected at large for eight year terms with two elected each year. Board vacancies are filled by gubernatorial appointment, and the Governor is an ex-officio member of the Board without voting rights. Also without the right to vote on the Board is its chairman, the Superintendent of Public Instruction, who is responsible for the execution of the State Board's policies.

The duties of the members of the State Board of Education, as specified by the constitution, are to exercise "leadership and general supervision over all public education, including adult education and instructional programs in state institutions, except as to institutions of higher education granting baccalaureate degrees."[4] The constitution also indicates that the State Board of Education "shall serve as the general planning and coordinating body for all public education, including higher education, and shall advise the legislature as to the financial requirements in connection therewith."[5] Thus, the Board's authority is general in nature and includes the functions of supervision, planning, and coordination. It is clear that its fiscal capacity is limited to advising the state legislature. The significant limitation of Board powers is in the area of higher education where the governing bodies of the institutions retain autonomy. Usdan, Minar, and Hurwitz cited this limitation in authority by indicating:

> There has been a continuing controversy over lines of authority between the SBE and the governing boards of the state colleges... It appears that the State Board of Education is timid in the use of its constitutional powers with respect to higher education. The board will become powerful only when its constitutional powers are asserted and tested, but this does not appear likely in the immediate future. For this reason the individual governing boards of the state colleges will probably tend to continue ignoring the State Board of Education, thereby rejecting control and causing friction between the levels of education in the state.[6]

One year after the 1963 constitution was ratified, the state legislature enumerated some additional powers and duties of the State Board of Education. The Board's powers were to include teacher certification and licensing, jurisdiction over the operations of the schools for the blind and the deaf, control over the rehabilitation institute, regulation of school bus transportation, inspection of educational corporations, and appointment of the members of the State Board of Public Community and Junior Colleges. Even in the area of post-secondary two-year institutions, except for this appointment power, the governing authority rests with locally-elected boards and not with the State Board.

In his opening remarks at the first meeting of Michigan's first State Board of Education in 1965, the Superintendent of Public Instruction stated "that in my opinion the new State Board of Education is the most important to have been created by the 1963 Constitution and a tremendous challenge and opportunity lie before it."[7] This first State Board happened to be totally Democratic and since that time the Board has been generally mixed with respect to individual political party affiliation. But in the behavior of Board members after their election, one researcher found that "board member behavior once elected does not conform to any predetermined pattern that is based on party membership. Indeed in a recent move to abolish the state board, it was described as conspicuously inadequate in meeting

the crises of education in Michigan, and essentially unaccountable to the governor, the legislature, and even the nominating parties."[8]

Governor William Milliken's Commission was not at all impressed with the Board's performance as a recent move to abolish the elected Board indicated. A Commission on Educational Reform, appointed by the Governor, noted that:

> Such a board, members of whom are nominated almost as an afterthought by both political parties, brought into office on the tide of presidential or gubernatorial elections, forced to function in a political unit which is apt to be fiercely partisan, and given only limited power to fulfill the requirements of their office, is bound to fail, and has failed as an effective governing body.[9]

The Superintendent of Public Instruction and The State Department of Education

While the leadership and effectiveness of the State Board of Education may be somewhat in question in the state of Michigan, it is clear that the Superintendent of Public Instruction functions in a major leadership capacity in state educational governance. As the Chairman of the State Board of Education and chief executive officer of the State Department of Education, the Superintendent of Public Instruction holds a position established by constitutional provision and heads a major state agency. The Michigan State Department of Education reports that they have 2500 employees. There are 242 full-time professionals assigned to its headquarters office, considerably more than the national average of 191.[10] In addition, some 455 professional staff are working for the State Department of Education in other capacities throughout the state. In terms of salary Michigan's State Superintendent ranked fifth, as of 1972, of all the chief state school officers.[11]

When Michigan gained statehood, its first constitution provided for the appointment of the State Superintendent by the Governor with confirmation by a joint legislative vote. The relationship between the chief

state school officer and the Governor evidently has come almost full circle from appointment by the Governor, to popular election, to appointment by an elected State Board of Education, to increasing calls for bringing the educational structure closer to the apparatus of state government. Gubernatorial appointment of the State Superintendent, apparently affected by the Jacksonian philosophy of placing major state offices under the control of the people, gave way to direct election in 1852, an arrangement which prevailed for over a century.

The popular election of the State Superintendent gave the office visibility across the state and gave the elected State Superintendent a mandate from the people. Some of the difficulties of this arrangement were described by Masters, Salisbury, and Eliot in their study of educational politics in Michigan. The partisan nature of Michigan politics as described by Masters et. al. meant that the State Superintendent, who often happened to be a Democrat, had to take positions on issues favorable to those of his own party in order to retain party support.[12] Yet, educational proposals would be voted upon favorably by the legislature only if they gained bipartisan appeal especially during the many years when the legislature was controlled by Republicans. At the same time, local level educational officials looked to the State Superintendent as an educational statesman and not as a politician. Thus, the role of the State Superintendent was a difficult one complicated by conflicting demands from educators and politicians. The small amount of support provided by the Educational Council in the state tended to be diluted because the constituent organizations were usually unable to arrive at consensus positions on key educational issues.

The 1963 constitution promised to correct this problem of dual expectations by creating an elected State Board of Education having a

Board-appointed Superintendent of Public Instruction as its chief executive officer. Even with this new structure, the experience of the past decade suggests that many of Michigan's educational problems remain. The elected State Board of Education, as cited in the Usdan et. al. study, has been loath to assert its authority by taking positions of leadership on major educational issues.[13] The chief burden for educational leadership in the Wolverine State has remained with the Superintendent of Public Instruction.

Additional insight into the Office of the Superintendent of Public Instruction in Michigan can be provided by a review of Scribner's examination of the leadership exercised by the three most recent State Superintendents in Michigan.[14] Lynn M. Bartlett served as an elected State Superintendent from 1957 until 1965 which included the period of transition as provided by the 1963 constitution. Ira Polley was the first State Superintendent appointed by the State Board of Education and served from 1966 to 1969. The current State Superintendent, John C. Porter, began his tenure in 1969 as Acting Superintendent and in 1970 as State Superintendent.

State Superintendent Lynn Bartlett, elected by Michigan voters four consecutive times, exercised a kind of "educator-politico style" of leadership. During Bartlett's tenure the Michigan political leadership changed from Democrat to Republican. Therefore, some of the challenge of providing educational leadership in the state seemed to be related to changing political leadership. With a Republican majority in the state legislature and Republican control of the Governorship, educational issues during State Superintendent Bartlett's tenure in the 1960s tended to become enshrouded in party politics. Yet, the Michigan State Department of Education experienced considerable growth during these years with added programs in curriculum development, statistical services, and school

plant planning. Much of the State Department of Education's effort was evidently outside the mainstream of political involvement. At the end of Bartlett's fourth and final term of office, he drew attention to the pressing concern of educational financing in the state especially to the continuing decrease in the state's share in supporting the schools. The state legislature responded to the concern about school financing in appropriating $200,000 for a comprehensive study, directed by J. Alan Thomas, to deal with school finance in Michigan at the elementary and secondary levels.

The first State Superintendent appointed by Michigan's State Board of Education was Ira Polley, an experienced administrator in education and government. Scribner noted that Polley brought a different kind of leadership to education in Michigan.[16] He reorganized the State Department of Education in several areas, and he worked to unify the state educational leadership in the implementation of the recommendations contained in the Thomas Report. With Polley's initiative, the State Department of Education strengthened its programs in evaluation, planning, and research. It was reported that Superintendent Polley did not hesitate to recruit young and talented individuals who had demonstrated research potential in other areas.[17] Toward the end of Polley's tenure, Governor Romney departed for a federal position. William Milliken, Romney's successor, had considered the direct appointment of a Superintendent of Public Instruction to replace the partisan elected State Board of Education. Polley, favoring this suggested arrangement, came into direct conflict with the State Board of Education, five of whose members vigorously opposed abolishing the State Board. At the same time, another major issue, parochiaid, brought Polley into conflict with the State Board. The State Board of Education was split on the parochiaid question with some members backing Governor Milliken's

position favoring aid for parochial schools and some members supporting Polley's opposition to such a program. The combined effect of the conflict over the State Board's possible replacement with a State Superintendent appointed by the Governor and the parochiaid issue resulted in a position of impasse in the state's educational leadership. State Superintendent Polley finally resigned in 1969 and took a position in higher education in the state.

The last of the three State Superintendents under consideration is Michigan's current chief state school officer. John C. Porter, former head of the State Department's Bureau of Higher Education and Acting State Superintendent after Polley's resignation, was to become the first black to hold a State Superintendency in the nation. An aggressive administrator and a skillful planner, John Porter has led the State Department of Education to a new level of effectiveness in state educational affairs. The current State Superintendent reorganized much of the structure of the State Department of Education into major service areas. Bringing new personnel into the State Department, State Superintendent Porter strengthened its capacity for leadership and expertise. The current role of John Porter and his relationship with other major policy-making groups will be examined more fully later.

The State Legislature

In the mid-1960s, Grumm examined several variables which he found were highly related to the degree of professionalism and performance of state legislatures.[18] These factors were legislators' compensation; the expenditures for legislative staff, services, operations, and printing during the 1963-1964 biennium; the number of bills introduced during that biennium; the length of regular and special legislative sessions; and a

legislative services score based on work done by the Citizens Conference on State Legislatures. On the derived dimension of legislative professionalism, Michigan ranked fifth of all states behind only California, Massachusetts, New York, and Pennsylvania. Based upon this ranking, one could conclude that Michigan legislators comparatively were well paid, the legislature appeared to be well-staffed, and the legislative sessions tended to be lengthy during which many bills were introduced.

More recently, the Citizens Conference on State Legislatures extensively examined the fifty state legislatures to obtain more information about their functions and to analyze their performance.[19] The Citizens Conference designed a Legislative Evaluation Study which delved into several areas of legislative performance including staffing, compensation, time, committee structure, facilities, leadership, rules and procedures, size, and ethics. Five broad categories were developed: functionality, accountability, informedness, independence, and representativeness. Each state legislature was assigned a score for each category after the results of the Study were compiled. The performance of the Michigan state legislature ranked among all states in each category was as follows:

Functionality.....15
Accountability.....22
Informedness..... 9
Independence.....12
Representativeness..... 3

The Michigan state legislature was ranked very high, in fact, behind only New York and California, on the dimension of representativeness which included the factors of diversity among legislators, the diffusion of leadership, access to resources, and size and complexity of the legislature. The Michigan state legislature was ranked high on the dimension of informedness which included the factors of time for the sessions, the

number of legislative committees, the interim legislative activities, and the form and content of bills.

The Citizens Conference ranked the Michigan legislature somewhat lower on the dimensions of independence, functionality, and accountability. On the accountability dimension on which the Michigan legislature was ranked lowest, questions were examined regarding districting, public access to legislative information, and constraints on the legislative leadership. Michigan's overall ranking was eighth among the fifty states on its legislative performance. Compared to other states in the region, Michigan ranked lower than Illinois and Wisconsin but higher than Ohio and Indiana. One may conclude that the Michigan legislature appeared to be rather effective in its work and was considered to be a highly representative and informed body.

More recent statistical evidence would tend to corroborate some of these earlier findings. In 1970, Michigan legislators earned a biennial salary of $36,000, as did the legislators in New York State.[20] Only in California were legislators' salaries higher. In 1973, The Book of the States again indicated that Michigan legislators were well paid for their work with a salary only exceeded by legislators from California and Illinois.[21] While rate of pay, alone, may not be indicative of a more effective legislative performance, one can conjecture that a more attractive salary would tend to encourage more qualified individuals to regard the job of legislator as full-time, thus making it less necessary for a legislator to maintain other employment.

The Michigan state legislature consists of 148 members including a House of Representatives of 110 members and a 38-member Senate.[22] The structure of the legislature provides for 33 standing committees in the

House and 14 standing committees in the Senate. This rather sizeable number of legislative committees undoubtedly was a strong factor accounting for the Citizens Conference assessment of the Michigan legislature as an informed body. With a diverse committee arrangement, bills may be considered by a committee structured to review a particular variety of legislation. In size, the committees in the lower house range from seven to sixteen members, and the Senate committees include from five to eight members. While committee hearings are open to the press and public at the chairman's discretion, legislative decision-making in Michigan, as in other states, effectively appears to be shielded from public view. Political party caucuses and leadership control undoubtedly are major factors in the ultimate output of the legislative committees.

Other factors related to the ability of Michigan's legislature to generate and process information are the number and nature of its legislative service agencies.[23] A bipartisan Legislative Council was created in 1965 and is responsible for recommending substantive legislative programs to the state lawmakers. A multi-purpose agency is the Legislative Service Bureau which includes an extensive reference and library facility, a bill drafting service, and a research service for bill analysis. Headed by a Director and a full-time staff, the Legislative Service Bureau provides technical assistance to the Committees on Appropriations, Taxation, and other legislative committees as well as giving advisory service to individual legislators. A Law Revision Committee, created in 1965, gives bill drafting service and substantive program advice to legislators and conducts necessary statutory revisions. There is a Legislative Auditor General who conducts legislative post audits. In the important area of fiscal matters, two Legislative Fiscal Agencies engage in budgetary review and

analysis for the Senate and House Appropriations Committees respectively.

Visible evidence of the information capabilities of the Michigan state legislature may be seen in the volume of legislation considered and enacted by these lawmakers each year. Table 11 indicates that during each legislative session for the past several years, the Michigan legislature has been in session for the entire calendar year. While the legislature is in recess one or two days weekly to permit individual legislators to spend time in their home areas, it is not uncommon for the legislature to be in session over 300 calendar days annually. The number of bill introductions, during the eight-year period from 1964 through 1971, exceeded 1,500 each year. During the 1969 legislative session, over 3,000 pieces of legislation were introduced. One of the reasons why the number of bill introductions is so large in Michigan is the fact that there is no time limit on bill introduction. In the enactment category, the Michigan legislature during this eight-year period, 1964 through 1971, enacted over 200 bills annually. In the 1968 legislative session, 364 bills were enacted.

TABLE 11

NUMBER OF BILL INTRODUCTIONS AND ENACTMENTS BY THE MICHIGAN LEGISLATURE

Year	Length of Session in Months	Number of Bills Introduced	Number of Bills Enacted
1964	5	1,528	293
1965	12	1,730	411
1966	10	1,560	351
1967	12	2,123	371
1968	8	1,587	364
1969	12	3,114	339
1970	12	1,643	253
1971	12	2,951	233

SOURCE: Book of the States, The Council of State Governments, Lexington, Kentucky, 1964-1965, 1966-1967, 1968-1969, 1970-1971.

It is noteworthy that in Michigan a great many more bills are introduced than enacted by the legislature. One of the reasons explaining

this fact is that committees do not have to report all bills onto the floor of the legislature for final vote. Thus, pieces of legislation may be effectively terminated within each legislative committee precluding a more general consideration by the entire legislature. Additionally, bills may be carried over to future legislative sessions. A bill can be tied up merely by committee inaction and even carried over to the next legislative session where it may never be reported out of committee.

There are reasons for Michigan's somewhat lower ranking by the Citizens Conference on the performance dimensions of functionality, independence, and accountability as noted previously.[24] Some of the factors contributing to these lower rankings included difficulties in managing time resources, leadership selection and constraints on leadership, treatment of minority, conflicts of interest, and veto relationships with the Executive. These factors, it would seem, are related to what was discussed previously as overriding aspects of Michigan politics, particularly the degree of political party competition, and the intensity of political party conflicts based on ideological positions. The extent to which political party strength can change in Michigan may be seen in Table 12. Even during the six-year period when Michigan's Governors were Republican, political leadership changed hands in both House and Senate. Democratic control in the House was lost in 1967 and regained with small margins in 1969 and 1971. In the Senate, Democratic control in 1965 gave way to Republican control in 1967 and 1969 with a stalemate prevailing in 1971. Such a change in political party control in either house results in a lack of continuity over time and a high degree of political competition among Michigan lawmakers.

TABLE 12

POLITICAL PARTY LINE-UP IN THE MICHIGAN LEGISLATURE

Year	Category			
	House of Representatives		Senate	
	Democrat	Republican	Democrat	Republican
1965	73	37	23	15
1967	54	56	18	20
1969	57	53	18	20
1971	58	52	19	19

SOURCE: Book of the States. The Council of State Governments, Lexington, Kentucky, 1964-1965, 1966-1967, 1968-1969, 1970-1971.

The Governor

The state's chief executive stands at the apex of state government. In many states the governor is not only the chief executive but also is political party leader and legislative leader. At best, Michigan's governors in recent years have achieved one or two, but not all three of these leadership roles, thus seeming to reduce their effectiveness.

One important aspect of the leadership roles of the governor is his formal power. This area has been examined by Schlesinger who considered the factors of tenure potential, the power of appointment, budgetary control, and veto power.[25] Combining these four factors into a combined index of governor's formal powers, the Michigan Governor was ranked second highest on a scale of fourteen rankings of formal powers. The Michigan Governor was considered equal, in formal powers, with the governors of California, Minnesota, New Jersey, Pennsylvania, and Maryland. The governors of these six states were ranked slightly less powerful than governors in New York, Illinois and Hawaii.

In tenure potential, the Michigan Governor was ranked in the highest of four categories due to the fact that terms were four years in length

and there were no restraints on reelection. The Michigan Governor and the governors of sixteen other states were ranked in the highest category in tenure potential. In power of appointment, the Michigan Governor and the governors of nine other states were ranked in the second highest of five categories. The appointment power factor was derived from the governor's ability to appoint up to sixteen major state officers. In the budget area, the Michigan Governor was ranked in the highest of five categories along with the governors of thirty-five other states. These governors retained full responsibilities in budget preparation, sharing this power with only direct appointees. On the final factor, veto power, Michigan's Governor was ranked in the highest of five categories due to a provision for a line item veto and the requirement that a vote of at least 60 per cent of the legislature was necessary to override a veto. In veto power, the Michigan Governor and the governors of twenty-four other states were ranked in the highest category.

On only one dimension, the area of appointment power, was the Michigan Governor's power outranked by the powers of the governors of ten other states. Thus, in terms of the governor's formal powers, the Michigan Governor emerges favorably compared with most other states. There are many other aspects of the governor's capabilities, and several of these must be considered.

The citizens of the state of Michigan have been willing to authorize constitutional conventions and to ratify the recommendations of such conventions. Of the fifty states, only nine have had more state constitutions than Michigan.[26] Nine states, including Michigan, have adopted four state constitutions. Thirty-two states have had less than four state constitutions during their histories as states. In the 1970 general

election in Michigan, a non-Presidential year, 66 per cent of the registered voters turned out.[27] This relatively high percentage was much greater than the average turnout found in some earlier studies of Michigan. One cannot deny the apparent interest of Michigan voters in state affairs.

One particular aspect of the 1963 constitution, reapportionment, deserves mention. The issue of reapportionment became quite visible in the 1950s after several decades of population increase in Wayne County (Detroit), which increased its representation in the legislature with reapportionment every tenth year.[28] In 1952, Michigan voters approved a plan for a so-called balanced legislature, which in effect gave a bit more voice to Detroit and Wayne County spokesmen while making the Senate a body representing fixed districts. The Senate, therefore, retained its non-urban composition. Discontent with the 1952 balanced legislature grew until the issue of reapportionment was a hotly contested issue in the constitutional convention of 1961-1962. Republicans, controlling the Senate, wanted to hold to the balanced legislature. Democrats clearly favored a legislature reapportioned on a one man-one vote principle. After protracted conflict over the manner of reapportionment including several landmark court cases at both state and federal levels, the issue was decided by a 1964 federal court ruling requiring state legislatures to be apportioned according to population. This ruling seemingly provided the basis for an adequate balance between urban and rural areas but in effect the rapidly growing suburbs, often Republican, gained the most ground in the legislature. Democrats, however, do at least stand a chance of having a stronger voice in the legislature as their recent gains in political party line-up indicate.

The eighty-year hold which Republicans maintained in Michigan politics came to an end, as noted previously, in 1932. Since that time Michigan has become typified by intense political party competition. In the Executive Office the leadership centered on the success of Democratic Governor G. Mennen "Soapy" Williams during the 1950s and Republican George Romney in the 1960s. As one writer described, "Williams sought to make Michigan a laboratory for social democracy."[29] With the backing of Walter Reuther of the United Auto Workers and August "Gus" Scholle of the Michigan C.I.O., Williams was able to effect broad changes by increasing state services as well as taxes. While Williams was frustrated by a conservative, rural-dominated Senate, he was able, by shrewd political bargaining and appealing to the Michigan citizens, to effect reform in teachers' salaries, workmen's compensation, unemployment, and mental health. He also made key gubernatorial appointments to judgeships, state boards, and commissions. Williams' tireless campaigning saw him reelected five times during the 1950s but the ire of the business community was engendered by the continuing rise of taxes. As Michigan entered the 1960s locked in a battle over the state house control, it was Republican George Romney who emerged successfully although Romney's appeal was based more on his success in the American Motors Corporation than on his Republican affiliations.

Romney's independent stature and his unprecedented reform in business enabled him to win the 1962 gubernatorial race even though it was only by a narrow 80,000 vote margin.[30] George Romney's accomplishments during his six-year tenure were very significant for the Wolverine State. He led the state to its first income tax during a booming period of economic growth, and he got voter approval for ratification of Michigan's fourth state constitution. Thus, George Romney appeared to be instrumental in restoring some

public confidence in state government. There can be no doubt that Governor Romney successfully moved the core of the Republican party somewhat to the progressive middle from the conservative right. The Republican revival may have been a marginal victory, because after Romney's departure in 1969 the Democrats made even further gains in the state legislature, as noted earlier.

William Milliken, Romney's successor, has been unable to capture the support of the Republican party, as did his predecessor, as indicated by Milliken's very narrow victory in 1970.[13] Undaunted by his narrow victory, Governor Milliken set out to bring reform into Michigan government by his appointment of young, aggressive aides, an attempt to deal with Detroit's growing fiscal difficulties by encouraging bloc grants to the city, and a revolutionary proposal to restructure Michigan's system of school financing. As Michigan entered the 1970s, however, it was faced with deepening economic recession, as previously shown in this report, and an increasing dilemma in its cities, especially in Detroit. It is entirely possible that the problems facing Michigan at this point in time are so complex with such ramifications that exercising successful executive leadership may be an unattainable objective. The issue of school finance, for instance, has broad-reaching implications for the state's educational and fiscal structure. Equality of educational opportunity, a burdensome property tax, and the issue of a flat-rate or graduated income tax present a real dilemma to the state lawmakers. It is to the policy issue areas to which we now turn.

FOOTNOTES

[1]Ellwood P. Cubberley, State School Administration, Houghton Mifflin Co., Boston, 1927, p. 271.

[2]Dewey Wahl, Problems of Transition: Changing a State Department of Education from a Partisan to a Nonpartisan Political Structure, Purdue University Press, 1973, p. 93.

[3]Michigan, Acts (1935), as quoted in Dewey Wahl, Ibid., pp. 101-102.

[4]Beryl I. Kenyon and T. Thomas Thatcher, Michigan Legislative Handbook 1971-1972, Constitution of The State of Michigan of 1963, Article VIII, Lansing, 1971, pp. 190-193.

[5]Ibid.

[6]Michael D. Usdan, David W. Minar, and Emanuel Hurwitz, Jr., Education and State Politics, Teachers College Press, New York, 1969, p. 91.

[7]Lynn M. Bartlett, as quoted in Dewey Wahl, op. cit., p. 107.

[8]Jay D. Scribner, "Allocating Federal Aid to Education in Michigan: The Political Context and Administrative Arrangements," University of California at Los Angeles, 1971, p. 22.

[9]Commission on Educational Reform, as quoted in Jay D. Scribner, Ibid., p. 22.

[10]Sam P. Harris, State Departments of Education, State Boards of Education, and Chief State School Officers, U.S. Government Printing Office, Washington, D.C., 1973, p. 42.

[11]Ibid., p. 92.

[12]Nicholas A. Masters, Robert H. Salisbury, and Thomas H. Eliot, op. cit., pp. 251-283.

[13]Michael D. Usdan, David W. Minar, and Emanuel Hurwitz, Jr., op. cit., p. 91.

[14]Jay D. Scribner, op. cit.

[15]Ibid., p. 43.

[16]Ibid., p. 46.

[17]Ibid., p. 49.

[18]John G. Grumm, "The Effects of Legislative Structure on Legislative Performance," in State and Urban Politics, ed. by Richard I. Hofferbert and Ira Sharkansky. Little, Brown and Co., Boston, 1971, pp. 298-322.

[19]John Burns, The Sometime Governments, Bantam Books, New York, 1971, p. 52.

[20]The Book of The States 1970-1971. The Council of State Governments, Lexington, Kentucky, 1970.

[21]The Book of The States 1972-1973. The Council of State Governments, Lexington, Kentucky, 1972.

[22]Ibid.

[23]Ibid.

[24]John Burns, op. cit.

[25]Joseph A. Schlesinger, "The Politics of the Executive," in Jacob and Vines, op. cit., pp. 210-237.

[26]The Book of The States, op. cit.

[27]Ibid.

[28]Willis Frederick Dunbar, op. cit., pp. 651-653.

[29]Neal R. Peirce, op. cit., pp. 418-428.

[30]Ibid.

[31]Ibid.

SECTION III

SCHOOL FINANCE - A POLICY ISSUE AREA

Michigan last enacted major school finance reform legislation in 1973. To imply that this was an isolated event evolving in one year would be in error, however. The Bursley Act, as it came to be called after the Senate Education Committee chairman, is actually a statutory decision that spans a number of years and issues--beginning with serious study of school finance during the late sixties, made necessary by increasing fiscal shortcomings and tax inequities at the local level, directed by voter rejection of a constitutional referendum permittimg full state funding of education, and culminating in legislative approval of a modified power equalization formula, in August, 1973.

While these events are unique to Michigan, school finance reform and the accompanying call for local property tax relief are concerns which must be addressed by every state. Consequently, before discussing the Michigan process in detail, it would be advantageous to view the Wolverine State from a broader perspective--in comparison with the financial conditions operating in other states. The following rank orders are based on data accumulated before passage of the Bursley Act.

Comparative School Finance Data

School finance statistics in the different states are commonly matched on the basis of "need," "ability," "effort," and "equity." One dimension of need is the number of students who require a public education. As illustrated in Table 12, Michigan ranked relatively high (eighth) in the proportion of students compared to the general population. Moreover, unlike some states, Michigan's pupil population continued to increase steadily during the sixties and into the early seventies, rising to 2.2 million by 1972.[1]

In aggregate terms, then, educational need continued to remain at comparatively high levels in Michigan, even though more recent information indicates that enrollments are now beginning to drop at approximately 1 per cent a year.[2] Although the student population is slowly decreasing, the cost of the educational bureaucracy continues to rise, which makes the fiscal demand on the public schools a constant one, at least for the present.

TABLE 13

MICHIGAN'S RANKING AMONG THE OTHER STATES
ON SELECTED DIMENSIONS OF "NEED" AND "ABILITY"

	Michigan (Ranking in Parenthesis)	U.S. Average	Highest State	Lowest State
"Need": estimated school age population as a percentage of total resident population, 1972	26.6% (8)	24.9%	New Mexico 28.5%	Florida 21.8%
"Ability": Per capita personal income, 1971	$4,430 (12)	$4,156	New York $5,000	Miss. $2,788
"Ability": personal income per child of school age, 1972	$16,352 (16)	$16,3 2	New York $21,153	Miss. $9,926

Table 13 also provides some measures of financial ability, or a state's level of wealth in being able to fund public services. On both dimensions, per capita personal income and the personal income behind each student, Michigan ranked near the national average and above the majority of states. Thus, strictly in dollar terms, Michigan has a relatively high capability for providing revenues for public services, including the schools.

Table 14 compares the states according to the actual effort, both in taxes and in expenditures, that they devote to public services in general and to education in particular. Michigan ranked at or slightly below the national average in its effort to finance all public services. The Wolverine State ranked higher than the U.S. average when only education was considered. On both dimensions, Michigan came out lower than its financial ability

(Table 13) would indicate, except when higher education was included in the computations.

Finally, Table 14 also presents a rough measure of equity, or the attempt that states make to equalize the financial disparities existing between its rich and poor school districts. On this dimension, Michigan's comparative standing was far lower (41st) than on any other financial dimension, a significant reflection of the inadequacies inherent in the old foundation program.

TABLE 14

MICHIGAN'S RANKING AMONG THE OTHER STATES ON SELECTED DIMENSIONS OF "EFFORT" AND "EQUITY"

	Michigan (Ranking in Parenthesis)	U.S. Average	Highest State	Lowest State
"General Effort":				
State and local tax collections in 1970-71 as a per cent of personal income, 1971	11.1% (24)	11.1%	New York 13.8%	Ohio* 8.7%
Per capita total general expenditures for all functions, 1971	$441.11 (25)	$443.64	Alaska** $1519.85	Ohio* $285.74
"Educational Effort":				
Public school revenue receipts, 1971-72, as a per cent of personal income, 1971	NEA 6% Research (20) Estimate	5.6%	Alaska** 9.1%	Nebraska 4.1%
Per capita state expenditures for all education, 1971	$191.51 (15)	$170.75	Alaska** $599.34	Ohio* $109.66
"Equity":				
National School Finance Project Equalization Scores, 1968-69***	3.844 (41)	4.131	Hawaii 8.400	Conn. 2.295

*These figures predate Ohio's 1971 enactment of a graduated state income tax.

**Reduce 30% for comparable purchasing power on the U.S. mainland.

***Defined as "measuring the extent that state and local funds are being used to equalize the financial resources available for education in a state."

SOURCE: National Education Association, Rankings of the States, 1973, Research Report 1973-R1, pp. 42, 48, 54, 60; Roe L. Johns and Richard G. Salmon, "The Financial Equalization of Public School Support Programs in the United States for the School Year, 1968-69" in Roe L. Johns, et. al. (eds.) Status and Impact of Educational Finance Programs (Gainesville, Florida: National Educational Finance Project, 1971), pp. 136-138.

States can also be compared according to the ways in which they divide up the burden of funding education among the three levels of government. Table 15 indicates that for the 1972-73 school year, Michigan portioned out this responsibility almost evenly between its state and local governments. This was less of a local burden, but more of a state burden than the national average. Thus, even before passage of the Bursley Act, Michigan was shouldering a relatively larger share of educational costs at the state level. In addition, the Wolverine State received comparatively little financial assistance for education from the federal government.

TABLE 15

DIVISION OF FINANCIAL RESPONSIBILITY TO THE PUBLIC SCHOOLS BY LEVEL OF GOVERNMENT, MICHIGAN AMONG THE OTHER STATES

	Michigan (Ranking in Parenthesis)	U.S. Average	Highest State	Lowest State
Estimated per cent of revenue for public elementary and secondary schools, 1972-73:				
			New Hampshire	Hawaii
Local government	48.6% (27)	51.2%	89.8%	3.0%
State government	47.6% (18)	41.0%	89.0%	6.1%
			Miss.	Conn.
Federal government	3.8% (47)	7.7%	26.9%	3.1%

SOURCE: NEA, Rankings of the States, 1973, pp. 49-50.

(In 1971-72, 46 per cent of state aid to the public schools came from funds earmarked from half of the state sales tax, a four per cent liquor excise tax, and a two cent tax on each package of cigarettes. The balance of state education monies was derived from a variety of tax revenues channeled into the State General Fund. For all practical purposes, the property tax is the sole source of revenue for the public schools at the local and county levels. Total expenditures for public elementary and secondary education exceeded $2.5 billion annually.)[30]

Finally, states can be ranked according to the size of their tax burdens. At a time when the property tax is increasingly under attack, Michigan's relative standing, as shown in Table 16, was higher than the national average.

The tax burden on state government was also above the U.S. average. In both cases, Michigan was neither very high nor very low, ranking among the middle third of the states. From a comparative perspective, then, the Wolverine State had the potential to provide property tax relief by having the state assume a larger share of educational costs.

TABLE 16

MICHIGAN'S RANKING AMONG THE OTHER STATES ON SELECTED MEASURES OF TAX BURDEN

	Michigan (Ranking in Parenthesis)	U.S. Average	Highest State	Lowest State
Measures of Property Tax Burden:				
Per capita property tax revenue of local governments, 1970-71	$192 (18)	$178	Mass. $286	Alabama $34
State and local property tax collections in 1970-71 as a percentage of personal income in 1971	4.6% (20)	4.4%	South Dakota 6.9%	Alabama 1.3%
Measure of State Tax Burden:				
State tax revenue in 1970-71 as a percentage of personal income in 1971	6.4% (20)	6.0%	Hawaii 10.0%	Ohio* 4.0%

In summary, according to these figures, Michigan was a relatively wealthy state in which the demand for education had remained consistent; where, during the early seventies, the state had made an above average effort in funding the public schools; but where the equalization of such revenues had been a problem. Such statistics are rough measures at best, however. They do not depict the absolute change over time in each state. And these figures, like any others, must be interpreted within the distinctive context in which educational decisions are made, within the economic, social, and political conditions that set each state apart from all others. Consequently, the following sections of the paper examine the political process through

which recent demands for and efforts at passing school finance reform were actualized in Michigan.

School Finance Legislation in Michigan Prior to 1973

The Michigan Legislature enacted a school foundation program, based on a Strayer-Haig deductible millage formula, in the School Aid Act of 1957. Changes over the next fifteen years took the form of annually amending this legislation. In theory, the foundation program calls on the state to provide revenue to compenstate for disparities in local property tax wealth, as long as the local districts maintain a specified minimum millage rate for the support of its public schools. In practice, however, the results in most states have been less than adequate.

Michigan's state foundation program was based on the concept of State Equalized Valuation or SEV per pupil. Because local assessment practices differ, the state adjusted each district's total assessed property valuation to fifty per cent of current market value of all real property.[4] This amount, when divided by the student "membership" (full-time equivalent students) in each district resulted in the SEV behind each child.

State aid was used to equalize the wealth and per pupil variations among most of Michigan's 604 school districts. The formula subtracted the amount that a specified millage rate, "the deductible millage," would yield in each local district from a specified state foundation program or "gross allowance." The amount of both the deductible millage and the gross allowance were mandated yearly by the state legislature.[5]

In order to further aid the low SEV districts in approaching the level of spending behind each pupil in the high SEV districts, state assistance was generally allocated through two different formulae. For 1972-73, the formula

for low-SEV (poor) districts with a State Equalized Valuation of less than $17,750 was $715 (the gross allowance) minus 20 mills (the deductible millage). In the same year, the formula for high SEV districts with a State Equalized Valuation of $17,750 or more was $644 minus 16 mills.[6]

As a result of these calculations, in 1972-73 the average district had a $20,268 SEV behind each student and received $320 per pupil in state assistance. Forty-three districts had SEVs of less than $10,000 and received $515 or more per pupil. At the other extreme, fifty-eight districts with SEVs of $35,000 or more received $84 or less from the state. And the wealthiest districts with SEVS of $40,250 or more received no state aid through this formula.[7] Thus, the state foundation program in Michigan, which allocated 86 per cent of all state grants for education,[8] had some equalizing effect at the local level.* Even so, significant disparities and inequities between rich and poor districts as well as between high-effort and low-effort districts continued to exist, making demands for change all but inevitable.

Pressures for Reform

In the years leading up to passage of the Bursley Act, several factors combined to put pressure on Michigan's executive and legislative branches to abandon the state foundation program. These included the inequities inherent in the formula itself, the rising costs of education, and the frequency with which Michigan voters were willing to defeat property tax levies.

*(Note: State assistance in Michigan was also provided through several grant programs outside of the foundation formula. This included aid for pupil transportation, compensatory education, special education, remedial reading, vocational education, and a municipal overburden factor to help the inner cities.[9])

1. Basic Problems with the State Foundation Program

The inequities of Michigan's state aid formula can best be illustrated by comparing data from four local school districts within the Detroit Metropolitan area for the 1970-71 school year, as shown below in Table 17.

TABLE 17

SCHOOL FINANCE DATA FOR FOUR SELECTED DISTRICTS, 1970-71

District	1 Mill Yield ($/Pupil)	Millage Rate	Local Revenue ($/Pupil)	State Aid ($/Pupil)	Total ($/Pupil)	Staff per 1,000 Students
River Rouge	$60	21	$1260	0	$1260	60
Wayne	13	36	468	362	830	48
Detroit	18	21	378	278	656	38
Inkster	8	26	208	463	671	44

SOURCE: "School Finance Reform in Michigan,: Bureau of Programs and Budget, Technical Report C1b, April; 1972, p. 5; these figures exclude state categorical aid and federal aid.

As these figures indicate, even with the addition of state aid which attempts to equalize, the richer districts were still able to spend more money per pupil and to provide a smaller pupil/teacher ratio, all with a lower tax effort. Not only could the state foundation formula not compensate for disparities in local wealth; it also placed a damper on taxing incentive, particularly in the poor districts. In a $10,000 SEV district in 1972-73, the difference between a low taxing effort of ten mills and a high effort of 30 mills was $200 per child, while in a $35,000 SEV district the same tax differential yielded $700 per child.[10] Local effort was further complicated by Michigan's constitution which, except for a number of constitutional exemptions, placed a fifty mill limitation on all local spending, including that for the schools.

2. Rising Costs

In addition to the shortcomings of the foundation formula, the costs of education were rapidly on the rise at the state and local levels. During the period between 1961-62 and 1969-70, total operating expenses of the entire state educational system increased by 167 per cent, from $611.6 million to $1.573 billion. In the same period, per pupil expenditures from both state and local sources for public elementary and secondary education went from $375.66 to $726.88. The state's expenditure alone rose in absolute terms from $299 million in 1961-62 to almost $658 million in 1969-70, as well as in the proportion of the total state budget going to K-12 education.[12]

Increased costs can also be seen in the change in teacher salaries in Michigan, given impetus by a 1965 state law granting public employees the right to collective bargaining. During the period from 1961-62 to 1971-72, the average teacher salary almost doubled, from $5,898 to $11,671.[13] Such expenditures no doubt placed additional strains on the existing foundation formula, leading to a serious search for alternative finance models.

3. Taxpayer Revolts

Pressures to change the school foundation program came from yet another source. Public disapproval of additional millage for the public schools had mounted in recent years, as illustrated by Tables 18 and 19. In all of 1970 and through March of 1971, 42 per cent of the operating levies and 62 per cent of the bond issues were defeated by the Michigan electorate, even though the number of such requests had been substantially reduced from the late sixties.

Whether such evidence of voter disapproval was due to public dissatisfaction with the schools, the property tax, or government in general is difficult to determine. No matter, the end result was the same. Increasing failure of local government to provide funds for public education pointed to either severe financial cut-backs in the schools or to a larger state role. The economic situation became especially critical in Detroit in the spring

of 1973. The school system, legally restrained from borrowing funds, was near to closing its doors because of a $75 million deficit.[14]

TABLE 18

SUMMARY OF VOTER RESPONSE TO
OPERATIONAL MILLAGE ISSUES IN MICHIGAN BY FISCAL YEAR

Fiscal Year	Total	Number Passed	Per Cent	Number Defeated	Per Cent
1968-69	598	366	61%	232	39%
1969-70	656	458	70%	198	30%
1970-March 1971	164	95	58%	69	42%

SOURCE: Michigan Department of Education, "Full State Funding of K-12 Education," Lansing, Michigan, October 25, 1971, p. 3.

TABLE 19

SUMMARY OF VOTER RESPONSE TO
BOND ISSUES IN MICHIGAN BY FISCAL YEAR

Fiscal Year	Total	Number Passed	Per Cent	Number Defeated	Per Cent
1968-69	122	41	34%	81	66%
1969-70	112	42	37%	70	63%
1970-March 1971	66	25	38%	41	62%

SOURCE: Michigan Department of Education, "Full State Funding of K-12 Education," Lansing, Michigan, October 25, 1971, p. 4; in Michigan, the local districts funded the total costs of school construction.

It is not surprising, therefore, that voter defeat of property tax millage when combined with rising costs and the problems inherent in Michigan's foundation program, made school finance reform "the single most controversial question before the Michigan Legislature in each session since 1969."[15]

Defining the Issue

1967-1968 These pressures for school finance reform in Michigan first gained legislative momentum from a research study during the late sixties. Proposed by the State Board of Education and funded for $200,000 by the

Michigan Legislature in 1966, the "Thomas Report,"[16] was the most comprehensive study of lower education in Michigan's history.[17] Reporting back to the Board of Education in December, 1967, the Thomas Report reached a number of conclusions, including the following:[18]

> There is a great variation in the educational opportunities available to students in the state of Michigan.
>
> There exist critical problems in the financing of urban education. These problems demand adequate financial support from the citizens of the state.
>
> The procedures for distributing state aid to school districts are overly complex, and do not accomplish the purpose of equalizing educational opportunity.
>
> A revenue crisis also faces Michigan's nonpublic schools. There is a proportional shift in the student body from nonpublic to public school enrollment.

The Thomas Report also concluded that Michigan's problems were historical in nature, that a thorough revision of the financial structure was called for, and that increased state aid was needed to provide equalization of local district wealth.[19] While it did not recommend a specific school aid proposal, this study outlined the strengths and weaknesses of four general alternatives, which then set the parameters for future legislative consideration:[20]

> Alternative 1: A percentage equalizing formula in which the state would fund not less than 10 per cent but not more than 90 per cent of the operating expenditures in any district. The state's share of the costs would be inversely proportional to the property wealth (equalized valuation per pupil) of each district.
>
> Alternative 2: A power equalization formula in which the wealth of each district would be equalized, guaranteeing an equal amount of combined state and local funds per pupil per mill up to 20 mills, but leaving the choice of millage rates to each local district. (A version of this proposal was eventually adopted in 1973.)
>
> Alternative 3: A Strayer/Haig foundation program (then in effect in Michigan) providing for the sharing of costs between the state and local governments up to a specified amount, with the local districts funding any additional expenditures. The formula would be supplemented by special purpose categorical grants.

> Alternative 4: A formula based on a classroom unit, rather than on a per pupil approach, with funding varying according to the different types of students--basic, handicapped, vocational, etc.

According to one government source, the Thomas Report "both stimulated and served as a resource document for practically all subsequent proposals for school financing reform."[21]

1969-1970 One year after the Thomas Report was published, Lt. Governor William Milliken became Governor when his predecessor, George Romney, accepted a cabinet post in the Nixon Administration. As a former state senator for eight years and chairman of the Senate Education Committee, Milliken had previously displayed an interest and some expertise in educational issues.[22] Assuming control of the Executive Office in 1969, Governor Milliken publicly aligned himself on the side of school finance reform, making it a major goal of his Administration.[23] Since he was not then prepared with a specific proposal, the Governor appointed a Commission on Educational Reform composed of non-educators with himself as chairman. Charged with a broad mandate to take up educational concerns, including review of the Thomas Study proposals and the objective of a "...more equitable and adequate system of financing education,"[24] the Commission traveled across the state conducting public hearings for six months. By this time, school finance reform in Michigan was developing a partisan flavor. According to one source:

> From the outset, educational reform became a bone of political contention. The Democrats wanted to be credited with having taken the initiative by commissioning the Thomas study. Now a Republican Governor was threatening to steal the show. His commission was criticized by Democratic leaders in the legislature. Speaker of the House William Ryan said the proposal was "a delaying tactice" ....In retrospect, it appears that the Governor's commission was a device to gain time in order to draw up a detailed Republican legislative package for educational reform.[25]

Actually, many people were getting into the act by 1969. In addition to the Governor's Commission, a group of university professors of educational administration coalesced behind the classroom unit alternative mentioned in the Thomas Report. And the Michigan Board of Education recommended a new state aid formula based on power equalization.[26]

In September, 1969, the Commission on Educational Reform reported back to Governor Milliken. He, in turn, called a special session of the State Legislature in October in order to submit his proposals, which one source termed "the most radical restructuring of school financing ever officially backed on the U.S. mainland."[27] Although the Michigan legislators refused to enact the Governor's major recommendations for school finance reform, contained in ten bills and two constitutional resolutions, they did support some of his less extensive programs. Moreover, the proposals generated lengthy discussion and served as a preview of Milliken's future attempts at change. The 1969 recommendations included a constitutional amendment to allow the Legislature, following voter approval, to eliminate the local property tax for financing the schools (except for a 3-mill "enrichment" tax whose yield would be equalized by the state) substituting a 16-mill statewide property tax in its place.[28] Governor Milliken also advocated switching to a classroom unit (rather than per pupil) plan based on a proposal developed by the Michigan Association of Professors of Educational Administration.[29] The 1969 proposals reflected Governor Milliken's thinking on education in general. They called for greater "rationality" and accountability in and more centralization over the operation of the public schools. In addition, the Governor's legislative package contained proposals for a student assessment program and the elimination of the elected State Board of Education (then under Democratic control) with appointment of the Superintendent of Public Instruction transferred to the Governor. Milliken also

expressed dissatisfaction with education controlled by educators, wishing instead to encourage a more pluralistic educational system and to enlarge general government's responsibilities over the public schools.[30] Faced with these broad-based recommendations for change, the Michigan Legislature decided in 1969 to continue under the existing state foundation program, albeit at increased expenditure levels.

In 1970, school finance reform became intertwined with the parochiaid issue. According to one source, Governor Milliken conceived of changing the financing of the schools as a long-term process.[31] Hopeful that he would be elected Governor in his own right in November, 1970, Milliken saw the next four-year term as time in which to plan a complete school finance reform strategy. In the meantime, he appeared content to push for partial changes. Thus, the Governor proposed to provide limited state assistance to the parochial schools. Because of the controversy surrounding parochiaid, established political alignments were factionalized. The majority of the Michigan Board of Education members, by a vote of five-to-three,[32] supported the parochiaid bill. Then-Superintendent of Public Instruction Ira Polley opposed it, which reportedly prompted the Board to request his resignation. And most of the statewide educational interest groups, particularly the Michigan Education Association, opposed aid to nonpublic schools. As a result, serious attempts at school finance reform became impossible.[33] The resulting legislation was a two-year state aid proposal called the Spencer-Ryan Plan, after Democratic Speaker of the House William Ryan from Detroit and Republican Representative Roy Spencer. In return for their support of Ryan's and Milliken's parochiaid provision, Spencer and the rural Republicans gained legislative approval of a proposal guaranteeing equalization of the revenues derived from local income as well as local property taxes during the second year of enactment.[34] The proposal never went into

effect, however, as the additional state taxes needed to finance the plan were never approved. Passage of the parochiaid provision was also nullified by Michigan voters in a Michigan Education Association sponsored referendum during the November, 1970 election. By this time, Governor Milliken had withdrawn his support of the Spencer-Ryan Plan and was backing an alternative proposal. And finally, during the summer of 1971, the State Legislature repealed the Spencer-Ryan Plan and reverted back to a modification of the old state foundation program.[35]

Thus, the period of 1969-1970 in Michigan can be described as multi-directional. A new Governor was busy defining his educational priorities. The different educational interests were also defining their positions on school finance reform. They had to decide whether or not to support a Governor obviously committed to educational change yet one who also threatened their traditional sphere of influence in the formulation as well as the administration of such reform. Parochiaid was caught up in the more traditional school finance reform issues and influenced, possibly sidetracked, the outcome. And it was becoming increasingly obvious that more equalizing approaches to revising the state aid formula could not be dealt with apart from new methods of funding such approaches. The educational and taxation issues were clearly inseparable.

Alternative Proposals, 1971

Governor Milliken continued to push for major school finance reform during 1971--despite a narrow electoral victory in November, 1970; despite the growing disaffection of conservative members from his own party over his liberal and pro-urban stances; and despite the worsening economic conditions in the state due, in part, to a costly auto strike against General Motors in 1970.[36]

Initially, however, the economic burden on the state prompted an austerity program. In January, 1971, Governor Milliken announced an estimated $108 million deficit for the current fiscal year and proposed a $110 million reduction in state expenditures, including a 2 per cent cutback in school aid payments. This last provision provoked intense opposition among the legislators, who refused to sustain it. The Governor had also pledged to ask for "no new taxes this year."[37]

During April, 1971, in a Special Message to the Legislature, Governor Milliken recommended a comprehensive educational program which modified his 1969 proposals.[38] The newer package still stressed greater "rationality" and accountability in the operation of the schools. By this time, the Legislature had enacted a student assessment program, which was already being implemented. The Governor also abandoned his proposal to eliminate the State Board of Education, but wanted instead to appoint the board members. In addition, Milliken requested the legislators to repeal the present state aid program and to approve a constitutional amendment calling for the repeal of the local property tax for the schools, with an accompanying 6-mill local enrichment tax to be equalized by the state. In 1971, he did not specify a method through which state aid would be dispensed to the local districts. This was, according to one researcher, for political reasons:

> The major switch from the previous strategy was to leave unspecified how the state funds would be distributed to the school districts. Milliken did not want to open up this Pandora's box at this time, hoping thereby to focus attention on the issue of taxation and to smoke out positions on distribution before he presented his own. He also calculated that by presenting his distribution proposal later in the legislative session, there would be greater pressure on the legislators to pass it without major modification simply because of the time constraints... This new situation with the emphasis on taxation set the stage for the political bargaining that was to dominate the 1971 legislative session.[39]

Interestingly, an executive aide offered another analysis of the Governor's distribution plan. Attributing the absence of a distribution plan to "a lack of staff preparation rather than a conscious strategy," the aide remarked that he was amused "by what some outside observers call 'strategy' when the insiders know all the time that it was 'bungling'."[40]

In any case, Governor Milliken also relinquished his earlier proposal for a statewide property tax of sixteen mills to replace the local property tax revenues for education. His reason, inpart, was reportedly because a statewide property tax of this dimension could not generate the needed revenues for the state, due to the relative low elasticity of the property tax, thereby necessitating annual increases in the rates of other taxes.[41] The Governor's recommendation ignited the traditional battle in Michigan over a flat rate versus a graduated income tax, the latter championed by the Democratic Party, House Speaker Ryan, and organized labor.[42] Finally, Milliken proposed a 2 per cent value added tax (VAT) as a way of delaying any increase in the existing corporate income tax, forestalling an industrial exodus out of Michigan.[43]

Because of the varied political currents in the Legislature, Governor Milliken needed to bargain for his proposals. Debates over educational expenditures meshed with two other expensive programs in the state budget, public welfare and aid to the cities. Party caucuses in both houses differed over the order in which budget items should be resolved. House Republicans insisted on some form of property tax relief before they would consider the budget. House Democrats pushed for combining property tax relief with a constitutional referendum allowing for passage of a graduated income tax, while Republicans held out for separating the two issues. In the Senate, the Republicans indicated their opposition to a tax increase devoid of a

reduction in the property tax.[44] In mid-June, 1971, Governor Milliken urged that differences over the tax issue be temporarily postponed until after passage of the state budget, allowing the state to meet its financial obligations by the beginning of the fiscal year. This request was denied.

By the end of June, a stalemate existed. Speaker Ryan took a different tack. He recommended the creation of a "super committee," composed of three leaders from each party and from each legislative house, to hammer out a compromise. Dubbed the "Twelve Disciples" by the Michigan press,[45] the committee held daily, closed sessions, but failed to come up with a solution.

A tax measure was finally accepted by the end of July, 1971. In raising the income tax on both individuals and business, it fulfilled Milliken's request for additional funds needed to avert a reduction in state spending. The bill also made provisions for automatically voiding the tax increase in August, 1972, if the Legislature failed to place the issue of property tax reductions on the ballot by November of that year. While this measure did not resolve the major tax issues, it allowed the state to remain solvent.

Faced with the necessity of enacting a state budget, the Governor had to compromise over some of his earlier proposals. He now favored increasing the income tax on business. He withdrew from the position that tax increases should not be implemented until 1972. Moreover, Milliken accepted Speaker Ryan's proposed constitutional amendment which combined proposals allowing for a graduated income tax and for a limitation on the property tax, losing some of his own party support in the process. The constitutional amendment (House Joint Resolution GG) proposed by Ryan contained two additional propositions--a ceiling on the value added tax, if one would ever be enacted (to assure both business interests and the Democratic Party that it would remain at a low level) and the earmarking of millage limits for specific

educational purposes (to appease those who were against the elimination of the property tax in total for education and to prevent the revenues being used for teachers' salaries).[46] Whatever the implications of this multi-dimensional amendment, it never reached the voters. After passing the Democratic-controlled House by one vote and with Governor Milliken's strong endorsement, Resolution GG was bottled up in Senate committees. With the urgency of enacting a state budget already dissipated, the Senate, following the lead of the Republican caucus, sat on the amendment until after the deadline for placing the referendum on the ballot for November, 1971.[47] The fault was reportedly not entirely the legislators, however. One house leader placed part of the blame for the amendment's failure with Governor Milliken: "The Governor reversed himself a couple of times on the question of whether property tax reform and the graduated income tax should be combined in one issue. His indecision and wavering helped result in legislative refusal."[48]

Pinner, Collins, and Sederburg[49] point to two features of this bargaining process which are particularly significant. First is a reaffirmation of the adage "the squeaky wheel gets the grease." Immediate, short-term considerations (e.g. passage of the state budget) are frequently resolved at the expense of long-range objectives (e.g. tax reform in the form of property tax relief and a graduated income tax). The pressure to pass a state budget within an acceptable time frame could and was used as leverage to bring the sides together, resulting in Resolution GG. Thus, to persuade the Legislature to enact a state budget, Governor Milliken needed the approval of the Democrats in control of the House and of both parties which evenly controlled the Senate. The Democrat's support could only be achieved by the Governor's endorsement of a constitutional amendment to allow for a graduated income tax and his approval of increased welfare expenditures, a

key proposal of the Speaker. The Republicans who favored low spending levels would support the budget only if provision was made for property tax relief. This, in turn, was dependent on Democratic support, obtained through concessions on the graduated income tax. However, once the budget had been enacted, this pressure to bargain dissolved, along with the compromise reached in Resolution GG.

Second is the primacy of the taxation issue over the question of school finance reform. With the exception of Governor Milliken, the major interests in the political bargaining process did not focus on the distribution of state monies to the schools. Perhaps as a result, the educational interests did not play an active role in the compromises. According to Pinner et. al., the educators' major focus was on obtaining adequate expenditure levels for the schools. The particular method of taxation used to raise these revenues was not yet of primary concern.

Thus, the 1971 legislative session in Michigan did end with a state budget. The major tax and educational issues surrounding it, however, went unresolved. But school finance reform could hardly be ignored for long. Seven of Michigan's top ten news stories chosen by the Associated Press in 1971 had dealt with education. Five of these had directly related to the method of school finance.[50] The way in which Michigan would continue to fund its schools was clearly a public issue.

Mobilizing Support, 1972

Following the Legislature's failure to approve Resolution GG, Governor Milliken stumped the state to generate grassroots support for placing the property tax relief amendment on the ballot. When his own independent drive began to falter, the Governor urged the Michigan Education Association (MEA) to step in and circulate petitions to place the property tax limitation

and separately the graduated income tax issues before the voters without legislative endorsement. MEA agreed and announced its decision. The following day, Governor Milliken withdrew his own petitions and joined forces with the teachers.[51] Five-hundred thousand signatures were required to place the issue on the ballot. According to one MEA source, the Governor's Office collected 100,000 signatures for the property tax relief referendum and MEA gathered 600,000 and contributed $250,000.[52] The Democratic Party also undertook its own petition drive, but was unable to obtain the needed signatures.[53] A constitutional amendment, based on the MEA petitions, was placed on the ballot for voter approval in November, 1972. The amendment included two distinct issues: property tax reform and a graduated income tax:

> Proposal C sought to reduce the constitutional ceiling on local property taxes from 50 to 26 mills. All property taxes for the schools would be eliminated except for (within the 26 mills) an optional 6 mill enrichment tax, levied only after voter approval; $4\frac{1}{2}$ allocated mills for vocational, compensatory, and intermediate school district distribution; and an allocated 8 mills for counties and $1\frac{1}{2}$ mills for townships as well as a voted 6 mills for both.
>
> Proposal D sought to amend Michigan's Constitution which prohibited the enactment of a graduated income tax, allowing instead (but not mandating) the Legislature to enact such a tax.

Following passage of both proposals, the Michigan Legislature would have to enact a new educational finance system in time to provide monies for the schools beginning July 1, 1973. Approximately $1.1 billion would have to be recaptured by the State to replace the revenues lost from the local property tax. Neither constitutional proposal specified the method through which state aid would be distributed nor the revenue source used for such funds. One option, a statewide income tax, however, would be prohibited under the provisions of Proposal C.[54] Various interest, including the Governor, the Michigan Department of Education, the Senate Education

Committee, the Michigan Association of School Administrators, and the Michigan Association of Professors of Educational Administration were developing equitable allocation plans in the event that the constitutional amendment was approved.[55] The various plans centered around the legislative mandate under the proposed constitutional language, to "establish a program of general state taxation" to support the local school districts and "to assure equal and quality educational opportunity for all students."[56] The Senate Education Committee also served as a catalyst in bringing the various interests into tentative agreement on a single allocation plan prior to the November elections.[57]

As the various interests began to take positions on the constitutional amendment, two additional events contributed to the urgency of school finance reform in Michigan. In August, 1971, the Justices of the California Supreme Court had ruled against the constitutionality of a school finance system which based the quality of a child's education on the wealth of his or her school district. Following their lead, Governor Milliken and the State's Attorney General filed a similar suit in the Michigan courts (Milliken-Kelley v. Green). A second court case involved not financial, but racial discrimination. In September, 1971, a U.S. District Court Judge ruled (in Bradley v. Milliken) that Detroit's school system was racially segregated due to the "unconstitutional practices" of public officials in Michigan. Since school desegregation could no longer be accomplished within the Detroit city limits, rectification would require the cooperation of fifty-two surrounding suburban districts and the possibility of two-way busing and/or district reorganization.

Meanwhile, the different interests in Michigan continued to align around Proposals C and D.* The Michigan Education Association, according to an earlier agreement with Governor Milliken, had purposely separated the

*(For a list of some of the organizations in support of Proposal C and/or D, see footnote 58.)

two proposals in order to give each issue equal weight with the voters and to diminish the possibility of the defeat of both property tax reform and the graduated income tax.[59] MEA also hoped to dilute the conflicts which had pulverized legislative compromise the year before. Despite such efforts, controversy developed.

Some organizations--the State Board of Education and Superintendent Porter, as well as MEA and most of the other state education interest groups--supported both issues. A notable exception, the membership of the Michigan Association of School Boards, did not oppose the two proposals until the last minute. It then did so by a 2-to-1 margin.[60]

Certain proponents of Proposal C (the property tax limitation)--the Republican Party and the Michigan Chamber of Commerce--remained adamantly opposed to Proposal D (the graduated income tax). MEA had agreed to work with the Governor in pushing Proposal C if he would not oppose the graduated income tax.[61] Throughout his numerous public appearances and speeches on behalf of the property tax issue, Governor Milliken therefore maintained neutrality on Proposal D.

Other interests--such as the Democratic Party, the United Auto Workers, and the AFL-CIO--endorsed Proposal D, but not Proposal C. And although the major industries came out against both proposals,[62] there seemed to be very little organized opposition.[63]

State leaders generally felt that the graduated income tax had little chance of passage but that citizen support for the property tax limitation was more substantial.[64] Several public opinion polls conducted during October, 1972, appeared to bear this out, at least with regard to Proposal C. Between 60-65 per cent of Michigan voters favored the property tax issue, but 49-51 per cent disapproved of a graduated income tax.[65]

In spite of these early indications of support for property tax relief, on November 7th, the voters defeated both Proposals C and D. They voiced their opposition to a graduated income tax by more than a two-to-one margin. On the same day, Detroit residents voted down the renewal of a five-mill school tax for the third time in a row, even though the city's 300 schools faced possible closing several months early for lack of funds.[66]

There appear to be several reasons for the defeat of Proposals C and D. Once again, school finance was caught up in the general issue of tax reform. Traditional divisions in Michigan were again at work: Republicans and business interests favored property tax limits but not the enactment of a more progressive graduated income tax. Democrats and labor endorsed the graduated income tax but not the property tax reduction for fear of providing a windfall tax break to industry. The unions may not have been deeply supportive of the constitutional amendment, since they reportedly believed that the income tax would fail and they did not want one proposal without the other.[67] Consequently, advocates of change in school finance and taxation found themselves fighting among each other as much as with their opponents. The cleavages that had killed legislative action in 1971 once again helped to defeat the same issues before the voters in 1972.

Moreover, the educational community did not appear strongly united behind the two proposals. The Michigan Board of Education had voted by only a slim majority to support the constitutional amendments; then they were "rather quiet" and "after the fact" in their support.[68] A member of the Michigan Federation of Teachers calimed that his organization's advocacy of Proposals C and D was "on paper only."[69] Even MEA, which had successfully initiated the school finance issue experienced some internal dissension from teachers fearing the advent of statewide collective bargaining with

the enactment of full state funding of education.[70] And as recently as the previous year, MEA had been on record as opposed to full state funding, favoring instead the fiscal security of the existing local property tax.[71] Finally, according to one education reporter, "Michigan's educators have been clamoring for reform in the State's system of school finance for years, but they are not flocking to support the constitutional amendment."[72]

The citizens of Michigan apparently shared some of the apprehensions of the educators. These included the dread of terminating local control over the schools and the uncertainty that, once the property tax limit had passed, the Legislature would fund education adequately. Aware of Superintendent Porter's and Governor Milliken's urban orientation, many Michigan voters reportedly feared that most of the money would go to Detroit.[73] Such concerns were amplified by the press which described Detroit's problems in detail. The Detroit News also opposed the two proposals in a Sunday editorial.[74] The influence of the news media was perhaps even more significant than usual because of the complexity of the two issues.

Rich school districts opposed the constitutional changes for fear of having their higher spending levels curtailed. Yet even in the hard-pressed districts, like Detroit, the school board hesitated to support the proposals. This failure to endorse property tax reform reportedly angered the Governor, especially since Detroit had appealed to the State to save it from an $80 million deficit.[75] In November, the amendment lost by nearly a million votes in a three county area around Detroit, possibly because of the earlier court order calling for a metropolitan desegregation plan. According to several sources, many individuals apparently connected any change in the distribution of aid to the schools with the ability to implement desegregation.[76]

Finally, the constitutional amendment appeared to fall victim to public feeling against taxes in general. While school finance issues were going down to defeat (across the country as well as in Michigan) Michigan voters also defeated a Vietnam Veteran bonus and capital improvement issues for new criminal facilities in Detroit.[77] As one legislative leader in the Michigan House stated emphatically: "C and D were horrible misadventures anyway."[78]

But Michigan's school finance problems would not go away. Following the defeat of the constitutional amendment, Superintendent Porter requested a $22 million loan from the State to keep the Detroit schools open. At the same time, the Detroit Board of Education appealed for a $22 million bank loan, to be repaid from future state school aid payments. Without these funds, the board would be confronted with closing down the schools at the end of the month. And on November 23rd, the board members voted to close the Motor City's schools for eight weeks beginning December 21st if faced with insufficient finances.[79]

On December 29, 1972, the Michigan Supreme Court ruled on the school finance suit brought by Governor Milliken and the State's Attorney General. In a 4-3 decision, the Justices declared the existing method of funding the public schools in Michigan unconstitutional. When added to the possibility that 30-40 school districts would have to close their doors due to lack of operating funds, this court decision provided a powerful inducement for legislative action. Thus, where school finance reform in Michigan could once have been relegated to the background, overshadowed by the tax issue, in 1973 this was no longer the case.

Legislative Enactment, 1973*

In November, 1972, a Detroit Free Press editorial had summed up the defeat of the constitutional amendment as follows:

> We have a growing suspicion that there are more people in Michigan who like to talk about tax reform than want to do something about it. Governor Milliken tried to do something, and he has been politically embarrassed for his efforts. We hope that he will not let this defeat divert him from his goal.[80]

Governor Milliken did not give up. Instead he just shifted tactics once again. This time the Governor advocated school finance reform and property tax relief that could be enacted by the Legislature, without voter approval; that could overcome the traditional cleavages surrounding questions of property wealth and taxation; and that could satisfy the court challenge to the existing foundation program.

The November, 1972, elections had increased the Democratic control over the Michigan House by two, to sixty of the 110 seats. None of the thirty-eight senators had been up for re-election, thereby sustaining the nineteen-nineteen partisan split, with the Republicans in leadership positions by virtue of a Republican Lt. Governor. Thus the Governor, out of political necessity, had to come up with a proposal that would meet bipartisan scrutiny, avoiding the old pitfalls of the income tax controversy. This situation may have been brighter than first appears, however, as Governor Milliken was in the habit of cooperating with the House Democrats in passing his more liberally-oriented programs. As one influential Democratic

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*(Interviews for the Educational Governance Project were conducted in January, 1973, in Michigan, seven months before the passage of school finance reform legislation. Consequently most of the information pertaining to this section relies on secondary sources, notably Gongwer News Service, Inc., Michigan Report, Lansing, Michigan, January-September, 1973; and Gene Caesar, Robert N. McKerr, and Dr. James Phelps "New Equity in Michigan School Finance," the Senate Committee on Education (Lansing, Michigan) September, 1973. Mr. Caesar is consultant to the Senate Education Committee, Mr. McKerr is Associate Superintendent for Business and Finance, Michigan Department of Education, and Dr. James Phelps is Administrative Assistant for Education to Governor Milliken.)

leader in the lower chamber stated: "This is the first year for a real shot at major [school finance] reform....and no one questions the Governor's sincerity."[81]

Immediately following the defeat of Proposals C and D, Gilbert E. Bursley, Republican state senator from Ann Arbor and chairman of the Senate Committee on Education, contacted both Governor Milliken and Superintendent Porter. He urged that the three of them continue their joint efforts to reform Michigan's state aid program. Each man volunteered his school finance advisor to design a workable state aid program which could survive legislative and political differences.[82] The product of their collaboration was a modified power equalization measure, known in Michigan as an "Equal Yield" formula, which Senator Bursley introduced late in 1972. Briefly, this formula sought to eventually guarantee every local school district in Michigan the same per pupil amount from the same local millage rate. The plan would be phased in over a three-year period.

Prior to placing the measure into the legislative hopper for the 1973 session, a series of public hearings were held throughout the state. This initial Bursley Bill (SB 1495) was reportedly "a trial balloon."[83] Dr. James Phelps, educational assistant to Governor Milliken, and Gene Caesar, staff person for the Senate Education Committee, developed the formula. The Governor and Senator Bursley were interested in testing public reaction to the plan during the hearing period. The results prompted the formula's authors to note that the new plan was subjected "to more discussion and debate than any of the previous decade's annual state aid bills."[84]

In a statewide television address and in a Special Message to the Legislature on education, Governor Milliken publicly supported the "equal yield" formula introduced by Senator Bursley. The Governor's decision was reportedly shaped by three events: voter rejection of the constitutional

amendment in 1972, the Michigan Supreme Court school finance ruling, and the impending closure of Detroit's schools. In abandoning the constitutional route to educational and tax reform, Governor Milliken explained: "In rejecting Proposal C, the people said that they were not ready to accept a major change in the method of collecting and distributing monies for education. However, I do not believe, nor will I accept, that the public was condoning the inequities which the present system imposes on both students and taxpayers."[85] The Governor recommended an increase of 11.3 per cent, or $108 million, for Michigan's K-12 public schools for the coming year, the highest percentage per pupil addition in the state's history. This would increase the expenditures on elementary and secondary education to $1.22 billion, up from the present $1.11 billion.[86] In a separate proposal, the Governor also recommended property tax relief totalling $370 million for Michigan business and taxpayers over a two-year period.[87]

Senator Bursley introduced a school aid measure on February 8, 1973, when it became Senate Bill 110. Early indications were that the bill would enjoy relatively easy passage, at least in the upper chamber. Proponents of S.B. 110 included the Governor, MEA, the Michigan Association of School Boards, Superintendent Porter and the State Board of Education, and a bi-partisan group of twenty-one state senators which Senator Bursley had brought together as co-sponsors. Most significantly, the last group of proponents was a voting majority of Michigan's Senate. Opponents included the Michigan Federation of Teachers and a number of school superintendents and other administrators.[88]

The following week, the Detroit Board of Education requested a $75 million loan from the state to pay its debt, to be reimbursed from deductions from future state aid payments. The board members asked for either a 2.25 mill property tax or stand-by authority for a 0.3 per cent income tax, either one without a vote of the people. The revenues collected would

enable the board to obtain loans to keep Detroit's schools open for the remainder of the school year.[89] This resolution contained the recommendations of a 56-member task force, including several legislative leaders.[90] Bills providing for this authority, which included S.B. 110, had already been submitted by some legislators. Governor Milliken opposed the state's bailing out one school district, preferring instead that the Motor City borrow the funds from commercial lenders. Superintendent Porter supported granting the Detroit Board of Education the power to increase taxes without voter approval and felt that this autonomy should be granted to other hard-pressed districts as well.[91] Concerns were also expressed over the use of a property tax to finance a school debt. Some bond specialists argued before the Senate Education Committee that such an action would lower the credit rating of both the schools' and the city's bonds. The results would be higher interest rates and having Detroit become the only major American city unable to market its bonds with commercial banks, which purchase 75 per cent of all municipal bonds issued.[92]

Despite these warnings and due to the urgency of the situation, the Senate Education Committee approved a separate bill to give the Detroit school district the power to levy either the 2.25 mills or a 0.3 per cent income tax without a popular vote. This was to provide a short-term solution to Detroit's fiscal problems. At the same time, S.B. 110 was given a favorable report by this committee. The equal yield formula encountered its first crystallized opposition in the Senate Appropriations Committee to which it was next referred. However, after extensive committee hearings and consideration of alternative school foundation programs, the Bursley measure survived intact. On March 19th, S.B. 110 satisified the members of the fiscal committee, who, by a vote of 6 to 4, recommended it for passage.[93]

A vote by the full Senate, however, was preceded by the U.S. Supreme Court's decision in the Rodriguez case. In a 5-4 ruling, the Justices had found Texas' state aid system for education not in violation of the Federal Constitution, turning the responsibility of school finance reform back to the state. Observers in Michigan anticipated that their own State Supreme Court, with the newly-elected Justices holding the balance of power, would eventually do likewise, reversing its earlier decision on the unconstitutionality of Michigan's school foundation plan. In spite of these concerns, alternative bills which retained the existing formula were defeated conclusively on the Senate floor. On April 5th, Michigan's State Senate sent S.B. 110 to the House, by a vote of 22-15.

Once in the lower chamber, the bill was assigned to the House Education Committee. Here it encountered a different challenge in the form of a full state funding formula, including a taxing program to implement it. A number of school superintendents and other administrators had consistently advocated full state funding for Michigan's public schools. Yet they reportedly did not feel that the alternative being debated in the House Education Committee was adequate.[94] Without broad-based support, this measure, along with any other formula, was not considered by the Education Committee. Senate Bill 110 was approved instead with an amendment extending its power equalizing provision to capital outlay as well as operating millage. It was then sent to the House Appropriations Committee on May 8th, by a vote of 9 to 4.[95]

While in this fiscal committee, the equal yield formula met its most formidable resistance.[96] The Democratic leadership of the House presented an alternative proposal sponsored by House Majority Floor Leader Bobby Crim and costing $43 million more than the Bursley bill. This formula, over a three year period, would bring every district to the same per pupil spending

level at 20 mills, with a maximum $100 increase each year. Districts above 20 mills would receive state aid, but not the maximum amount.[97] Originally, this proposal would also have placed a ceiling on maximum per pupil expenditures. But representatives from some high-spending districts objected to the restriction on local spending prerogatives.[98] On June 11th, the Appropriations Committee reported out this modified proposal, 10-5 with one Democrat dissenting, recommending it for passage by the full House.

A Democratic party caucus in the House revealed that this bill did not have the votes necessary for passage in the lower chamber. Moreover, the Republican caucus in the House seemed more than likely to unite behind Governor Milliken, who adamantly supported S.B. 110. The Republicans also favored the Bursley Bill because it had been amended in the House Education Committee to extend the power equalizing provision to capital outlay. This amendment proved to be a "critical strategic move," enabling the Republicans to withstand the Crim bill.[99] Consequently, the House leadership had to try again to reach a new compromise. Representative Crim said that his latest proposal was closer to the dollar figures passed by the Senate. He stated: "It takes care of the Governor's concern on the level of spending, it takes care of my concern with the low-effort districts."[100] Both Mr. Crim and Speaker Ryan were particularly concerned about Detroit. Although the Motor City was a relatively low-effort district in school millage, its total tax millage rate was quite high,[101] which made increasing the millage for schools more difficult.

After considerable debate on different compromise proposals, during which the Speaker even considered resigning his post,[102] the House passed a greatly modified S.B. 110 on June 29th, 56-46. In the process, it approved an amendment restricting the bill's effect by omitting the gradual leveling up contained in the second and third year of the three-year measure.

Speaker Ryan wanted the school aid plan for one year only, in order to work on a different formula for subsequent years.[103] Republicans contended throughout the five and a half hour House debate that the Democrat's amendments to the Bursley Bill were too expensive. They also argued that the changes thwarted the purpose of the equal yield formula, which was to reward high-effort districts, leaving decisions over millage rates at the local level. Democrats contended that amendments to reduce the penalty to low-effort districts would be fairer to the financially pressed cities, such as Detroit. At the insistence of members of their own party, the House Democratic leaders agreed to another amendment encouraging high-effort districts to lower their millage rates with no loss of spending power.[104]

Since the House bill differed from the one previously passed by the Senate, a 6-member joint conference committee was appointed in July to iron out the twenty-three items of contention. During a number of meetings, the members of the conference committee eventually reached consensus, including the reinsertion of the Senate's three-year plan and the original equal yield formula. The amendment allowing high effort districts to reduce their millage rates without a concurrent loss of spending was central in the bargaining. To retain this provision (which was later vetoed) and to begin the equalization of capital outlay a year sooner (which was also vetoed, but for technical reasons) the House Democrats agreed to the three year formula.[105] Following concurrence by both houses, on August 14th, Governor Milliken signed S.B. 110 into law as Public Act 101 of 1973.

Earlier during the same session, the Michigan Legislature had also provided emergency special assistance to Detroit's school system, as well as property tax relief for all of Michigan's needy residents. In two bills enacted in March, the legislators arranged a $75 million state loan for Detroit, requiring the district to either increase its property tax 2.25

mills as security under a special provision in the Michigan Constitution to repay "evidence of indebtness" or impose a school district 1 per cent income tax, the first and only one permitted under Michigan statute.[106] Detroit was authorized to levy a local income tax of up to 1 per cent which would be equated to 6½ mills in the state aid formula.[107] These two measures also greatly facilitated passage of the Bursley Bill. According to one source in Governor Milliken's Office:

> Detroit was given the power to levy a 1 per cent income tax rather than the 0.3 per cent. Although Detroit wanted the lesser amount, there was concern by many others that Detroit would not increase its local contribution and would be forced to continue deficit spending. However, with the power to levy a full 1 per cent, Detroit would be qualifying for greater state aid under the Bursley formula in addition to its local effort. So as a result, the votes (on the two bills affecting Detroit) were preliminary votes on the Bursley Bill and were criticized in this regard by representatives from Detroit. There is little question that this was a strategic move on the part of the proponents of the Bursley Bill, and without its inclusion, passage of the Bursley Bill would have been doubtful.[108]

In May, the Legislature had also enacted two measures which provided the first state tax reduction in memory.[109] Public Acts 19 and 20 of 1973 rebated $380 million--$10 million more than the Governor had requested--to the taxpayers of Michigan over a two-year period. These bills included a "circuit-breaker" originally proposed by Governor Milliken in his State of the State Message in January, 1973. The circuit-breaker reduced the property tax burden of all homeowners and renters, senior citizens, and disabled veterans and the blind who own homes when their incomes were low compared to their liability under the property tax. The Legislature also increased the personal state income tax exemption per dependent; reduced the intangibles tax on bank deposits, and savings and loan shares; and granted a tax credit to business.[110] The funds were to be replaced by state revenues accruing from a substantial state surplus, but without increasing state taxes. On August 14, Governor Milliken signed the school aid bill. He also vetoed three items: a program permitting high millage districts to

reduce their tax rates, a grandfather provision, and a section providing for the equalization of capital outlay similar to the equal yield formula in the first year of operation. However, he left the capital outlay provisions applicable for the next two years.[111]

At the signing ceremony for S.B. 110, Governor Milliken revealed his hopes and expectations for the new school aid formula. He stated, in part:

> This act corrects much of what has been wrong with education in Michigan, as well as in much of America.
>
> It is wrong for three times as much to be spent on the education of children in one school district as in another. This act can and will bring about a dramatic narrowing of the gap without lowering educational quality in high expenditure districts.
>
> It is wrong for taxpayers in one school district to carry four times as heavy a burden of school support as in another. This act will substantially narrow this gap as well--again, without lowering expenditures in wealthy districts.
>
> Above all, it is wrong that the wealth of a school district should affect either the quality of education a child receives or the tax rates paid by his parents and neighbors. This act will virtually eliminate property tax base wealth as a factor in school finance among districts...[112]

After nearly five years of proposals and political debate, Governor Milliken had finally achieved one of the major objectives of his administration--the enactment of school finance reform and property tax relief.

Basic Features and Implications of Michigan's Equal Yield Formula*

In aggregate terms, the following comparison illustrates the general fund expenditures for K-12 education for Michigan in 1972-73 and the spending levels at different points during the process of passing the

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*This section only highlights the major changes in Michigan's school aid formula. For a detailed analysis of S.B. 110, see Act No. 101, Public Acts of 1973; Gene Caesar and Dr. James Phelps, "New Equity for Schools and Taxpayers Alike," Lansing, Michigan; and Caesar, McKerr, and Phelps, "New Equity in Michigan School Finance/The Story of the Bursley Act," The Senate Committee on Education, Lansing, Michigan, September 1, 1973.

equal yield formula for 1973-74:[113]

1972-73 budget:	$618.5 million
Governor's recommendations:	$660.8 million
Senate version:	$704.6 million
House version:	$728.6 million
Final 1973-74 budget:	$684.4 million

As these figures indicate, the actual compromise reached in Senate Bill 110 was midway between Governor Milliken's request and the initial measure that passed the Senate.

Although $618.5 million was appropriated for the public schools in the 1972-73 budget, only $593.6 was actually spent. When this latter figure is compared to the $684.4 million in the 1973-74 budget, there is a 15.3 per cent increase in state funds for the public schools with passage of the new state aid bill.

Total state and local dollars for public and elementary education reached $1.24 billion under the Bursley Act, compared to $1.11 billion for the previous year. And education funds distributed solely through the equal yield formula increased $44.5 million from 1972-73 to 1973-74.[114] This was accomplished without passage of additional state taxes.

In less general terms, Senate Bill 110 guarantees to each local school district in Michigan an amount of combined state and local educational revenues equal to $38 per pupil per mill up to 22 mills in 1973-74; $39 per pupil per mill up to 25 mills levied in 1974-75; and $40 per pupil per mill without limitation in 1975-76. Thus, the first two years of the formula provide equalization of expenditures but only up to a certain millage rate (22 and 25 mills respectively). After the third year, however, a local school district can tax itself at any rate and be assured of combined state-local revenues for each mill levied. These particular provisions survived the legislative process intact, from the time that Senator Bursley

first introduced S.B. 110 until it was signed by Governor Milliken. The lawmakers also provided transitional legislation during the application of the three-year program to insure that local districts did not lose money by switching to the new formula.

Stated a different way, the equal yield formula guarantees that each local district receives in per pupil membership aid an amount computed first by subtracting the district's State Equalized Valuation behind each pupil from $38,000 in 1973-74, $39,000 in 1974-75, and $40,000 in 1975-76. The difference is then multiplied by each district's operating millage tax rate up to a minimum of 22 mills in 1973-74, 25 mills in 1974-75, and with no millage ceiling after 1975-76.

To illustrate, in 1973-74, at the $38,000 level and with the 22 mill limit:

- in a district with a $19,000 SEV, each mill up to the 22 mill limit will bring in $19 per pupil from local tax sources and $19 from the State.
- in a wealthy district with a $37,000 SEV, each mill will bring in $37 per pupil locally and $1 from the State.
- in a poor district with a $10,000 SEV, each mill will bring in $10 locally and $28 from the State.[115]

Each of the three districts, no matter what their local property wealth, receives $38 per pupil per mill from combined state and local sources, with the State providing revenue that cannot be derived locally. Districts above the $38,000 SEV level without state assistance, however, are not required to pay back the additional revenues to the state. Thus, the equal yeild formula is a modified version of the true power equalization model.[116]

The equalizing effect of Michigan's formula is demonstrated in the following comparison of a poor, medium, and rich district, all making approximately the same local millage effort, illustrated in Table 20.[117]

Before passage of S.B. 110, the median school district in 1972-1973 levied 24.6 mills, which generated $818 per pupil in state and local funds, excluding categorical grants. By 1975-76, under the equal yield formula, the median operating levy is projected to be slightly less than 25 mills, which will generate almost $1,000 per pupil for any district willing to tax itself at that rate.[118]

The equal yield formula also provides for some equalization of a local district's debt service obligation, a fiscal function which the State had not exercized in the past. Beginning in 1974-75, a school district will receive state aid for bonding millage rates on a similar basis as for operating millage. However, the previous year's data are used, relative to the 22-25 mill levels and the $38-$39 per pupil per mill amount.

TABLE 20

THE EFFECT OF THE EQUAL YIELD FORMULA ON THREE SELECTED DISTRICTS

DISTRICT	SEV PER PUPIL (local wealth)	MILLS LEVIED (local effort)		YEAR (Before SB 110) 1972-1973	1973-1974	1974-1975	(No millage ceiling) 1975-1976
Tri-County (poor)	$11,506	24	state aid	$485	$564	$618	$622
			local revenue	276	297	318	338
				$761	$861	$936	$960
Forest Hills (medium)	$20,543	24	state aid	$315	$350	$369	$356
			local revenue	493	530	567	604
				$808	$880	$936	$960
Monroe (rich)	$32,213	23.9	state aid	$129	$ 74	$ 47	$ 13
			local revenue	770	828	886	943
				$899	$902	$933	$956

Finally, special programs or need/cost variations are provided outside of the equal yield formula, through state categorical grants. These include, for example, compensatory education, special education, and vocational education.

Thus, by enacting school finance reform legislation in 1973, Michigan lawmakers accepted a new state aid formula. They did this without increasing taxes or changing the revenue and budgetary structures of both state and local governments. The result was a greater equalization of the existing total property wealth of the State, while retaining the choice of millage rates at the local level.

In doing so, Governor Milliken and the Michigan Legislature managed to circumvent two problems which had proven politically insurmountable in previous efforts. First, by enacting an equal yield formula, the lawmakers did not have to alter the State Constitution. (The local property tax limitation remained at fifty mills; the restriction on a graduated income tax was retained.) The Legislature could therefore approve a school finance reform measure without a vote of the people. Second, the equal yield formula did not alter the fiscal powers of the local school districts. The wealthy districts were not deprived of their superior ability to fund their schools, particularly since the state did not recapture any additional revenues above a set state-local expenditure level. In fact, the rich districts tended to support the equalizing effects of S.B. 110 precisely because they did not threaten the survival of their high expenditure programs. And leaving the selection of millage rates up to the districts appeased local interests which feared a usurpation of their powers by the State. As one of Governor Milliken's aides commented prior to the success of Senate Bill 110: "The rich had been effective in the past in stalemating any educational change. And the loss of local control had been used as an excuse for maintaining

the status quo."[119] By avoiding the rich/poor and state/local conflicts, the Governor and the Legislature were able to diffuse the usual opposition to school finance reform.

The equal yield formula therefore allowed new coalitions to be formed, based on local tax effort instead of wealth. Districts which willingly taxed themselves at high levels, regardless of wealth, found themselves allies. They, in turn, were opposed by low-effort districts, rich and poor.[120]

The new formula also prompted a realignment among the statewide educational interest groups. During prior attempts at school finance reform, it had reportedly been assumed that the "educational establishment" had to be appeased, often at a high cost. Yet while S.B. 110 factionalized the education groups--teachers and school boards for, administrators against--it remained politically salable.[121]

The effectiveness of S.B. 110, at this point, remains to be demonstrated. Early indications, however, are positive.[122] In any case, the extent of its equalizing provisions may just have to suffice. For, as expected, the Michigan Supreme Court nullified its 1972 decision concerning the unconstitutionality of the State's school aid program. The short-term impact will likely be negligible, especially with the passage of the equal yield formula. However, the Court's ruling makes future school finance reform less probable.[123]

A Concluding Comment

The events described in this section, if anything, highlight the pivotal nature of the Governor in reforming school finance legislation, at least in this time and place. As soon as William Milliken became Governor of Michigan, he made educational reform a primary goal of his Administration. The Governor

immediately appointed a Commission on Educational Reform. He gave numerous public speeches noting the needs of Michigan's schools. He presented special education messages to the Legislature complete with specific recommendations. And Milliken was the only Governor to "sue the system"[124] by bringing a Serrano-type case to the Michigan courts. Each of these actions helped bring education before the public, generating statewide debate on the issues and pressure for change.

Governor Milliken also combined the issues of equalization of public school funds and property tax reform, thereby enlarging the potential coalition for a change in both. In advocating reform, the Governor relied heavily on members of his own staff and on non-educational interests, such as the Chamber of Commerce and the Farm Bureau, for advice on school finance and tax proposals. In contrast, Milliken seemed to purposely shy away from the statewide educational interest groups, except for MEA. Even this latter alliance was late in developing, however. The Governor and the teachers did not join forces until 1972 when Milliken needed their aid in getting property tax reform on the ballot. This tendency for the Governor to advocate educational programs without the input of the educational groups placed them in an interesting position. Here, obviously, was a chief executive who placed a high premium on educational reform, which frequently meant taking substantial political risks. Yet in doing so, he frequently challenged the educator's perceived autonomy over certain considerations. Thus, for example, Milliken had advocated abolishing the State Board of Education. Rather than abandon the subject entirely when this recommendation went ignored by the legislators, the Governor modified his request to a governor-appointed board, a position, incidentally, more in tune with that of the educational interests.[125] In selecting members for his Commission on Educational Reform, Milliken turned to noneducators. He supported state aid

to nonpublic schools. And he advocated greater accountability in the operation of education. Thus, most of the educational groups were placed in a precarious position vis-a-vis the Governor: do they support a Governor committed to education and school finance reform, knowing full well that they were not part of his inner circle and that some of his other proposals would jeopardize their influence over the schools? Or, do they oppose the Governor and risk defeating some of their own legislative objectives? The finance issue brought Milliken and MEA close together. Whether such a coalition will continue for other issues and what position the other groups will take are less clear.

Finally, Governor Milliken seemed committed to certain principles, including equality of educational opportunity, almost without regard to the political consequences. Confronted with much inertia over or defeat of his school finance reform proposals by legislators and citizens alike, Milliken kept plugging away. As one of his own staff people remarked, "The Governor believes that education is the most important problem the State faces. He has been out on an educational limb and has had it sawed off many times."[126] In his State of the State Address in January, 1973, Governor Milliken admitted: "Our major failure in 1972 was in the highest priority of my administration--educational reform and property tax relief."[127]

Although Governor Milliken did not achieve his primary objectives--full-state funding and extensive property tax relief--in 1973 he accomplished reform within the parameters previously set by the legislators in 1971 and by the voters in 1972. This also included a return to emphasizing the distribution of school finance revenues rather than the revision of Michigan's tax structure. And, finally, in 1973, the Legislature considered and enacted both issues in separate measures.

Even Governor Milliken did not feel that education was a good political issue, at least in the short run. Several months prior to the passage of the Bursley Act, he commented: "Advocating educational finance reform has been a real blood bath, an ordeal. Still I would not change a thing. And I do expect to win."[128]

Given the constraints placed upon the situation, it can be concluded that Governor Milliken indeed came out a winner.

FOOTNOTES

[1]Gene Caesar, Robert N. McKerr, and Dr. James Phelps, "New Equity in Michigan School Finance; The Story of the Bursley Act," The Senate Committee on Education, Lansing, Michigan, September, 1973, Appendix D; and Citizens' Research Council of Michigan, "Council Comments," October 4, 1972, in Michigan Association of School Boards Journal, October, 1972, p. 9.

[2]Correspondence with a source inside the Governor's Office, Educational Governance Project, May 7, 1974.

[3]Michigan Department of Education, A Position Statement on "Full State Funding of K-12 Education," Lansing, Michigan, October 25, 1971, p. 3; Thomas L. Johns, "Public School Finance Program, 1971-72," U.S. Department of Health, Education, and Welfare, Publication No. (OE) 73-00001, p. 162; Citizens' Research Council of Michigan, "Council Comments," October 4, 1972, in Massachusetts Association of School Boards Journal, October, 1972, p. 9.

[4]Frank A. Pinner, John N. Collins, and William A. Sederburg, "Decision Making on the Reform of Educational Finances in Michigan," A Report to the Urban Institute, November 1, 1971, p. 36.

[5]For a year-by-year review of these figures, see Caesar, et. al., Appendix A.

[6]Ceasar, et. al., Appendix A.

[7]Caesar, et. al., pp. 5 and 6, Appendix B.

[8]Johns, p. 162.

[9]Johns, pp. 162-165; Pinner, pp. 37-38.

[10]Caesar, et. al., p. 7.

[11]Correspondence with a MDE source, Educational Governance Project, May, 1974.

[12]Pinner, et. al., pp. 31-33.

[13]Pinner, et. al., p. 32; Caesar, et. al., Appendix D.

[14]Caesar, et. al., p. 13.

[15]Caesar, et. al., pp. 8-9.

[16]J. Alan Thomas, School Finance and Educational Opportunity in Michigan, Michigan Department of Education, Lansing, Michigan, 1968.

[17]Ira Polley, former State Superintendent of Public Instruction as quoted in Thomas, p. 111.

[18]Thomas, pp. 323-324.

[19]Thomas, pp. 324-325.

[20]Thomas, pp. 332-335.

[21]Caesar, et. al., p. 12.

[22]Pinner, et. al., pp. 12-13.

[23]Pinner, et. al., p. 12.

[24]Pinner, et. al., p. 12.

[25]Pinner, et. al., p. 3.

[26]Caesar, pp. 13-14.

[27]Neal R. Peirce, The Megastates of America, (New York: W. W. Norton and Co.), 1972, p. 426.

[28]Caesar, et. al., p. 14; Pinner, et. al., pp. 12-15.

[29]Pinner, et. al., p. 13.

[30]Pinner, et. al., p. 15.

[31]Pinner, et. al., pp. 16-17.

[32]Correspondence with a MDE source, Educational Governance Project, May, 1974.

[33]Pinner, et. al., p. 13.

[34]Pinner, et. al., p. 17.

[35]Caesar, et. al., p. 15; Pinner, et. al., pp. 13, 16-17.

[36]Peirce, p. 424, p. 431.

[37]Pinner, et. al., p. 20.

[38]Governor William G. Milliken, "Special Message to the Legislature on Excellence in Education--Equity in Taxation," School Finance Reform in Michigan, Technical Report Clb., Bureau of Programs and Budget, April, 1972, Appendix.

[39]Pinner, et. al., pp. 18, 20.

[40]Correspondence, Educational Governance Project, May 7, 1974.

[41]Pinner, et. al., p. 20.

[42]Pinner, et. al., pp. 18, 21.

[43]Pinner, p. 20.

[44]Gongwer, pp. 5-6.

[45]Pinner, et. al., p. 22.

[46]Pinner, et. al., pp. 25, 26.

[47]Pinner, et. al., pp. 26-27.

[48]Interview, Educational Governance Project, January 23, 1973.

[49]Pinner, et. al., pp. 27-28.

[50]William C. Milliken, "School Finance Reform in Michigan," Michigan Association of School Boards Journal, October, 1972, p. 16.

[51]Correspondence with a staff person in the Governor's Office, Educational Governance Project, May 7, 1974.

[52]Interview, Educational Governance Project, January 9, 1973.

[53]Caesar, et. al., p. 16.

[54]Citizens' Research Council of Michigan, "Council Comments," October 4, 1972, found in Michigan Association of School Boards Journal, October, 1972, pp. 9-10.

[55]For a summary of the details of these proposals, see Gilbert E. Bursley, "Second Interim Report of the Special Committee on School-Aid Distribution," found in MASB Journal, October, 1972, pp. 27-33, 39.

[56]Michigan Education Association, Public Affairs Division, "Recommended Changes--State of Michigan Constitution," Fall, 1972.

[57]Correspondence with a Michigan State Senator, Educational Governance Project, May 7, 1974.

[58]A list of those organizations in support of Proposal C and/or Proposal D:

Organization	Proposal C Property Tax Reform	Proposal D Graduated Income Tax
The Michigan Board of Education	X	X
Michigan Education Association	X	X
League of Women Voters	X	X
Michigan Assn. of Nonpublic Schools	X	X
Michigan Federation of Teachers	X	X
Michigan Catholic Conference	X	X
Michigan Retired Teachers Assn.	X	X
Michigan Assn. of Elementary School Principals	X	X
Michigan Assn. of Professors of Educational Administration	X	X
Michigan Assn. of School Administrators	X	X

Michigan Assn. of Supervision and Curriculum Development	X	X
NAACP (Detroit)	X	X
The Republican Party	X	
Michigan Farm Bureau	X	
Michigan State Chamber of Commerce	X	
The Democratic Party		X
Am. Assn. of University Women		X
The United Auto Workers		X
The AFL-CIO		X

SOURCE: The Michigan Education Association, October 26, 1972.

[59]Michigan Education Association, "Answers to Your Questions About Tax Reform Proposals C and D," MEA Public Affairs Division, p. 1; correspondence with a staff person in the Governor's Office, Educational Governance Project, May 7, 1974.

[60]Interview with a source inside the Michigan Department of Education, Educational Governance Project, January 23, 1973; correspondence with a representative of MASB, Educational Governance Project, May, 1974.

[61]Interview with an MEA source, Educational Governance Project, January 9, 1973.

[62]Interview with a member of the House Education Committee, Educational Governance Project, January 9, 1973.

[63]Interview with a legislative leader, Educational Governance Project, January 23, 1973.

[64]Selected interviews, Educational Governance Project, January, 1973.

[65]The State Journal, October 4, 1972, p. B-10; Frederick P. Currier, The Detroit News, October 17, 1972.

[66]David Cooper, Detroit Free Press, November 9, 1972, p. 1.

[67]Interview with a member of the House Education Committee, Educational Governance Project, January 19, 1973.

[68]Interviews with a member of the State Board of Education and a spokesperson for the Governor, Educational Governance Project, January 19, 1973.

[69]Interview, Educational Governance Project, January 24, 1973.

[70]Interview with a member of the House Education Committee, Educational Governance Project, January 11, 1973.

[71]Pinner, et. al., p. 22; interview with a member of the House Education Committee, Educational Governance Project, January 11, 1973.

[72]William Grant, Detroit Free Press, September 24, 1972.

[73]Interview with a member of the House Education Committee, Educational Governance Project, January 11, 1973.

[74]Editorial, Sunday News, January 22, 1972.

[75]Grant, September 24, 1972.

[76]Interviews with several legislators and a MEA source, Educational Governance Project, January 1973; Caesar, et. al., p. 17.

[77]Cooper, November 9, 1972, p. 1.

[78]Interview, Educational Governance Project, January 23, 1973.

[79]Grant, November 23, 1972, p. 18-A.

[80]Detroit Free Press, editorial, November 9, 1972.

[81]Interview, Educational Governance Project, January 23, 1973.

[82]Gilbert E. Bursley, in Caesar, et. al., foreword.

[83]Correspondence with a source on Governor Milliken's staff, Educational Governance Project, May 7, 1974.

[84]Caesar, et. al., p. 30.

[85]Gongwer News Service, Inc., Michigan Report, Lansing, Michigan, February 7, 1973, p. 3.

[86]William Grant, Detroit Free Press, February 18, 1973.

[87]Gongwer, January 11, 1973, p. 1.

[88]Gongwer, March 17, 1973, p. 3 and Caesar, et. al., p. 32.

[89]Harry Salsinger, Detroit News, February 14, 1973.

[90]Gongwer, February 14, 1973, p. 3.

[91]Gongwer, February 14, 1973, p. 1.

[92]Detroit Free Press, February 16, 1973, p. 5A.

[93]Caesar, et. al., pp. 31-32; Gongwer, March 14, 1973, p. 1.

[94]Caesar, et. al., p. 32.

[95]Gongwer, May 8, 1973, p. 3.

[96]Caesar, et. al., p. 33.

[97]Gongwer, June 8, 1973, p. 1.

[98]Gongwer, June 1, 1973, p. 1 reports that opposition came from the wealthy, high effort districts. According to one senator active in the education fight, however "The opposition within the House Democratic caucus to the Crim Plan did not come from 'wealthy, high-spending districts.' This was the label that proponents of the Crim Plan applied to such districts which were really high-effort districts and most frequently 'poor,' low SEV districts. The hardcore support for the Bursley Bill in the House Democratic caucus centered in West Wayne County and Macomb County. With the possible exception of a single district--Dearborn--which was 'out of formula' and unaffected by either formula, the districts that held their House Democratic votes for the Bursley Plan were high-effort, low-SEV districts." Correspondence, Educational Governance Project, May 7, 1974.

[99]Correspondence with a source inside Governor Milliken's Office, Educational Governance Project, May 7, 1974.

[100]Gongwer, June 20, 1973, p. 1.

[101]Gongwer, June 25, 1973, p. 1.

[102]Gongwer, June 28, 1973, p. 2.

[103]Gongwer, July 18, 1973, p. 2.

[104]Gongwer, June 28, 1973, pp. 1-2; June 29, 1973, pp. 1-2.

[105]Correspondence with a source inside Governor Milliken's Office, Educational Governance Project, May 7, 1974.

[106]Caesar, et. al., p. 13.

[107]Caesar, et. al., p. 22; Gongwer, March 8, 1973, pp. 1-2; March 12, 1973, p. 3.

[108]Correspondence, Educational Governance Project, May 7, 1974.

[109]Gongwer, May 2, 973, pp. 1-2.

[110]For details of this law, see Caesar, et. al., Appendix G.

[111]Gongwer, August 14, 1973, p. 1.

[112]Caesar, et. al., pp. 34-35.

[113]Gongwer, Special Report, the 1973-74 Budget, July 31, 1973, p. 1.

[114]Gongwer, July 31, 1973, p. 1.

[115]Caesar, et. al., p. 21.

[116]See John E. Coons, William H. Clune III, and Stephen D. Sugarman, Private Wealth and Public Education (Cambridge, Massachusetts: Belknap Press), 1970.

[117] Caesar, et. al., p. 24.

[118] Caesar, et. al., p. 25.

[119] Interview, Educational Governance Project, January 19, 1973.

[120] Caesar, et. al., p. 28.

[121] Caesar, et. al., pp. 28-29.

[122] For a brief analysis of the first year's effects under S.B. 110, see Dr. James L. Phelps and Mr. Gene Caesar, "New Equity in Michigan School Finance," Lansing, Michigan, 974. Dr. Phelps, Administrative Assistant for Education in Governor Milliken's Office writes that "we are extremely pleased by the effectiveness of Senate Bill 110 at this point."

[123] Educational Commission of the States, Compact, January, February, 1974, pp. 36-37.

[124] Interview with a Governor's aide, Educational Governance Project, January 19, 1973.

[125] Correspondence with a former State Department of Education official, Educational Governance Project, May, 1974.

[126] Interview, Educational Governance Project, January 19, 1973.

[127] Gongwer News Service, Inc., Michigan Report, January 11, 1973, p. 2.

[128] Interview, Educational Governance Project, March 28, 1973.

SECTION IV

SCHOOL DESEGREGATION - A POLICY ISSUE AREA

The establishment and operation of racially segregated schools has never been legal in the State of Michigan. All four Michigan state constitutions, past and present, have provided for education free of discrimination because of "religion, creed, race, color or national origin."[1] The present state constitution adopted in 1963 established an eight-member elected State Board of Education with the responsibility for providing "leadership and general supervision over all public education,"[2] and also required every school district to provide schools for the education of its students without discrimination as to religion, race, color, or national origins."[3] Consistent with constitutional provisions, the general school law of the State of Michigan also prohibits the establishment or operation "of any separate school or department for any person or persons on account of race or color."[4]

State Board Action

A policy statement adopted by the SBE in April of 1966 held that "segregation of students seriously interferes with the achievement of the equal opportunity guarantees of this state; and that segregated schools fail to provide maximum opportunity for the full development of human resources in a democratic society." This statement found segregation no matter what its source, de jure or de facto, to be a barrier to equal educational opportunity. In the statement the SBE directed the establishment of an administrative focus in the SDE to identify the extent of racial segregation in the Michigan public schools and to provide technical assistance to local school authorities in reducing or eliminating such segregation.

The SBE further directed local boards to "consider the factor of racial balance along with other educational considerations in making decisions about selection of new sites, expansion of present facilities, reorganization of school attendance districts, and the transfer of pupils from overcrowded facilities."[5]

Responding to the policy statement of the SDE, the State Superintendent established the Office of Equal Educational Opportunity in the Department of Public Instruction in March, 1967. This new office was given the responsibility for coordinating and supervising the State Department's efforts toward implementing the State Board's policy statement on equality of educational opportunity. Part of the funds for maintaining and expanding the desegregation activities of the office in early 1968 were provided under a Title IV grant of the 1964 Federal Civil Rights Act.[6]

Four major activities of the Office of Equal Educational Opportunity have been identified. They are: 1) administering the annual Michigan Public School Racial Census which identifies schools where racial balance exists and provides a yardstick for measuring progress or lack of it in correcting racial balance over time; 2) furnishing assistance in desegregation efforts at the local level; 3) providing mediation in cases where racial conflict arose in the schools; and 4) educating local school officials toward current developments in the area of educational opportunity by providing information such as copies of recent court decisions. Much of this help has been in the form of encouragement, support, and technical expertise. A limited number of districts have received financial assistance under Title IV or the Civil Rights Act of 1964. A few smaller districts have received help from the SDE in preparing proposals for this grant money.[7]

One obstacle to desegregation efforts on the part of the SDE is the lack of anything specific in the present school code requiring compliance with the non-discriminating provisions of the Michigan constitution or school code as a condition to receiving state aid. The absence of such legislation precludes SDE officials from aggressively enforcing school desegregation.

In Michigan, as in other states, the separation of races in public schools has worsened in recent years. Although a larger percentage of Michigan schools are "integrated" today than ever before, the condition of racial isolation has grown more severe. Isolation refers to a condition where pupils of the same race are concentrated in the same schools. In 1970-71, three years after the SBE's policy statement, one half of the students in Michigan public schools were attending schools having no minority pupils. During the same year, almost 8 out of 10 black pupils attended schools that were 50 per cent or more black. One hundred and fifty of the state's schools had student populations that were 95 per cent black.[8] Between 1968 and 1970 there was a 1.3 per cent increase in the number of minority students that were attending 90 per cent minority schools.[9]

The condition of racial isolation is largely attributable to residential housing patterns, white out-migration from cities, and restrictive zoning. Since there has been no pressure coming from the state to compensate for housing segregation, local school boards have had little incentive to redraw attendance boundaries to eliminate racial isolation. Board members who do attempt to alleviate the conditions of racial isolation may face recall elections spearheaded by ad hoc citizen's groups, as happened in Lansing in 1972. When the Detroit Board tried to implement an

integration plan in 1970, it was met not only with an effort to recall Board members, but the legislature also passed a law forbidding the Detroit Board from carrying out its plan. One might conclude from these illustrations that because of lack of support in housing reform to reduce residential segregation patterns, local school officials who take initiative to desegregate schools may well face even greater reaction and pressure from outside groups and lawmakers in Michigan who appear resistant to change.

The Problem in Detroit

The most controversial desegregation issue in the State of Michigan has been the question of integrating the Detroit Public Schools. A court case, Bradley vs. Milliken, et. al., has been in litigation for the past three years with a decision expected by the U.S. Supreme Court sometime during the spring of 1974. The circumstances surrounding the case illustrate not only the relationship between the Detroit School System and the state government of Michigan, but also the response of the state government under judicial intervention to desegregate. As a means of understanding the issue more fully, a review of the formal actions that led up to the present will be presented. In 1969, in response to a general belief that the Detroit schools were ungovernable because of "bigness," the State Legislature passed a law requiring the Detroit schools to "decentralize." After holding public hearings on decentralization for six months, the Detroit Board of Education devised a plan that would create seven to eleven different regional boards within the Detroit school system. A week before the plan was to come to a vote, during an executive session of the Board, four members proposed the idea of changing feeder patterns into Detroit high schools, thus linking the decentralization plan with an integration plan.[10]

On April 7, 1970, the Detroit Board voted in favor of the proposal (henceforth called the April 7th Plan).

An immediate "backlash" against the plan occurred at both the state and local level. In Lansing, the State Legislature amended Public Act 244 by a bill, Public Act 48, Section 12C, which took away the right of the Detroit School Board to determine its own school attendance boundaries. In Detroit, recall petitions were instituted against the four school board members who had participated in the April 7th action. The recall campaign was successful and the four school board members who had voted for the plan were removed from office. Four new board members were appointed by the Governor and they, along with the incumbents, voted to rescind the April 7th Plan.

At this point the Detroit NAACP, along with a number of individual black and white parents, filed a complaint in the U.S. District Court alleging that the Detroit Public School System "was and is segregated on the basis of race as a result of the actions and policies of the Detroit Board of Education and the State of Michigan." In their suit against the Detroit Board of Education, its members, the Superintendent of Detroit, the Governor, the Attorney General, the State Board of Education, and the State Superintendent, the NAACP challenged the constitutionality of Public Act 48.

In response to the NAACP's motion for a preliminary injunction restraining the enforcement of this public law, the district court denied injunctive relief and granted a motion dismission the Governor and Attorney General as defendants.[11] On appeal, the U.S. 6th Circuit Court of Appeals ruled with the plaintiffs, holding that Section 12C of Public Act 48 "was an unconstitutional interference with the lawful protection of fourteenth amendment rights," and that the Governor and the Attorney General should not have been dismissed as "parties defendant at that stage of the proceedings."

The Appeals Court also ruled that the lower court was correct in not granting injunctive relief at that point. The case was then remanded to the District Court for trial with the suggestion that the April 7th Plan or "its equivalent" be instituted in the meantime until the case could be decided on its merits.[12] The district court gave the school board the choice of recommending to the court whether to proceed with the April 7th Plan or to devise another. An alternative plan called the "magnet" or "MacDonald" Plan (for the board member who proposed it) was accepted by the court during the interim period. The NAACP appealed again to the Circuit Court--this time seeking a reversal of the district judge's decision to implement the "magnet plan," but the appeal was denied.[13] On April 6, 1971, the trial on the complaint of segregation began, the arguments continuing until July 22, 1971. On September 27, District Judge Roth issued his ruling holding that the Detroit Public School System "was racially segregated as a result of unconstitutional practices on the part of the defendant Detroit Board of Education and the Michigan State defendants."[14]

While the court's ruling against the Detroit Board of Education was based on the usual evidence in segregation cases (i.e., the manner in which attendance boundaries were drawn, the creation and abolition of optional attendance areas, etc.) the court also found substantial evidence against the State defendants. This consisted of five major points.[15]

1. That the State Board of Education must approve construction plans and that in their requirements they state that "care in site locations must be taken if a serious transportation problem exists or if housing patterns in an area would result in a school largely segregated on racial, ethnic, or socio-economic lines." (The State had a responsibility to not approve the numerous violations of this policy that the Detroit Board committed.)

2. The state of Michigan discriminated against Detroit by allowing the Detroit School District a capital improvement bonding authority of only two per cent as compared to five per cent for all other school districts in the State until 1969.

3. The school district of Detroit was denied any allocation of state funds for pupil transportation, although such funds were made generally available to all students who lived over a mile and a half from their assigned schools in rural out-state Michigan, and even some suburban districts continued to receive transportation money because of a "grandfather clause."

4. When the Detroit School Board undertook to implement its April 7th desegregation plan, the State Legislature intervened by Act 48 specifically overruling the Detroit Board of Education's desegregation plan.

5. Cross district transportation of black high school students from the Ferndale School District to a black high school in Detroit could not have taken place without the approval of the SBE.

The last piece of evidence arose during the trial when it was noted that the Ferndale District (a suburban Detroit District), rather than educate its black high school students within its own system, had participated for many years in a contract with the Detroit Public Schools to educate them in one of Detroit's black high schools. In doing so the students were bused past suburban high schools and past predominantly white high schools in Detroit.

On October 4, 1971, at the first of a number of hearings on desegregation planning, Judge Roth ordered both the Detriot Board of Education and the SBE to submit "plans of desegregation designed to achieve the greatest possible degree of desegregation." Specifically, the Detroit Board was given thirty days to evaluate its "magnet" plan and sixty days to develop a broader city-wide integration plan.

The SBE was directed by the court to develop a "metropolitan" plan within 120 days which would encompass the three-county area of Wayne, Oakland, and Macomb (referred to in census terms as the Detroit Standard Metropolitan Statistical Area).

In the meantime, Governor Milliken and the Detroit Board appealed the ruling of Judge Roth to the U.S. Sixth District Court of Appeals. Their

actions were followed shortly by the SBE which in a five to three vote sought to appeal only the portion of the ruling that found the SBE guilty of establishing and maintaining a segregated system.

In support of the decision, the majority of the SBE said:

> In his written decision, Judge Roth suggested that the Board contributed to de jure segregation by not exercising responsibilities which the Board did not and still does not feel it possesses either by constitutional mandate or by statute. It is this interpretation which the Board is now appealing. The Board feels strongly that the description of its responsibilities as contained in the Roth decision is unsupported by law and must be tested in a higher court.[16]

While the opinion of the majority suggested an attempt on the part of the SBE to absolve itself of illegal actior, a strong statement issued by the three dissentors seems to reflect the moral side of the dilemma faced by the SBE.

> The fact the Board is appealing will throw in doubt our sincerity, collectively and individually, in publishing repeatedly over the years policy statements stressing our belief in equal educational opportunity and advocating the desegregation of Michigan schools.
>
> We believe our colleagues have this day made a non-productive, deceptive, and potentially mischievous decision which endeavors to portray to the public a State Board of Education dedicated to fighting the Roth decision while, at the same time, paradoxically, defending those very educational and social precepts upon which the decision is based and which we have all said for years we hold dear. In such hypocrisy we will not join.[17]

On February 23, 1972, the Sixth Circuit Court of Appeals ruled that the orders of Judge Roth were not appealable and dismissed the appeals of the various defendants.[18] This was followed by hearings in the District Court on the many desegregation plans being offered. Approximately three weeks before the Circuit Court's ruling on the appeal, the SBE had voted to submit six desegregation plans to Judge Roth for consideration without endorsing any particular proposal. The plans ranged from one that would involve no

change in pupil assignments to one that included busing practically every student in the three-county area. One UPI correspondent, noting that Judge Roth had ordered the SBE to develop a single desegregation plan, referred to the SBE's action as taking a "firm position on all sides of the fence."[19] The five to three vote by the SBE to submit the six plans reflected the schism concerning the Detroit case that had developed in the SBE since the decision to appeal Judge Roth's ruling. All three of the dissenters from the vote to appeal the case favored at least ranking the plans as to priority if the State Board was not going to endorse a single plan. One of the dissenters noted that the action was not in compliance with the Judge's order.[20]

On March 28, 1972, Judge Roth issued his "Findings of Fact and Conclusions of Law on Detroit-Only Plans of Desegregation" submitted by the Detroit Litigants. In it he rejected all Detroit-Only Plans, saying in part: "Relief of segregation in the public schools of the city of Detroit cannot be accomplished within the corporate geographical limits of the city." This led to the orders Judge Roth issued on June 14, 1972, entitled "Ruling on Desegregation Area and Order for theDevelopment of Plan for Desegregation." In his "Findings of Fact and Conclusions of Law in Support" of the Orders, he criticized the state defendants and specifically the SBE for failure "to meet, or even attempt to meet, the burden of coming forth with a proposal that promises to work."

Of the state defendants in general, Roth stated:

> State defendants in this hearing deliberately chose not to assist the Court in choosing an appropriate area for effective desegregation of the Detroit Public Schools. Their resistance and abdication of responsibility throughout has been consistent with other failures to meet their obligations noted in the Court's earlier rulings.[21]

Convinced that assistance from the State defendants would not be forthcoming with regard to an effective desegregation plan, the Judge established

tentative boundaries for a metropolitan remedy and created a panel of nine (later expanded to eleven) members to design plans for the desegregation of the Detroit Schools and 53 adjoining districts. He further assigned the State Superintendent, John Porter, with the assistance of other state defendants, the responsibility of examining and making recommendations for interim and final arrangements for the (1) financing, (2) administrative and school governance, and (3) contractual arrangements for the operation of schools within the desegregation area. Both Dr. Porter and the special panel were given 45 days to complete their respective tasks.

Twenty-one days after being created, the panel recommended that 295 school buses be ordered. Only July 11, 1972, Judge Roth ordered the state defendants to purchase or otherwise acquire the 295 school buses. On July 14, the State defendants obtained a temporary stay of the order to purchase the buses. In the Sixth Circuit Court of Appeals, on December 8, 1972, the same Court vacated the order directing a Michigan state official to purchase the buses. The Appeals Court also ruled that the individual school districts in the area outside of Detroit each had to be made parties to the litigation and must be offered an opportunity to be heard on their own behalf before the district court could establish the boundaries of a metropolitan plan.

In February, 1973, the State defendants again appealed the decision on desegregation, this time, to the entire nine judge panel of the 6th Circuit Court of Appeals. In May, 1973, the Circuit Court voted 6-2 to affirm the lower court rulings. The case was then appealed again by the defendants and was tentatively scheduled to be heard before the U.S. Supreme Court with a decision expected in the spring of 1974.

Summary and Analysis

Any attempt to look at the roles different actors played in the Detroit desegregation controversy must begin with the State legislature. In that body actions occurred which triggered the desegregation case and it is in that forum where hurdles to federally imposed desegregation can be erected. Initially it was the legislature which called for the decentralization of the Detroit schools with the passage of Public Act 244. When the Detroit Board of Education attempted to desegregate while decentralizing, the legislature responded by amending its decentralization act to prohibit changes in attendance boundaries on the part of the Detroit Board. This particular action, Detroit sources say, forced a reluctant NAACP to enter its court suit.[22] The Sixth District Court of Appeals ruled the amendment to be unconstitutional.

When the District Court ruled that the State of Michigan was guilty of segregation, two of the five points supporting the ruling were the direct result of actions by the State legislature. These were (1) the unconstitutional amendment previously mentioned, and (2) the limitation of a two per cent capital improvement bonding authority. A third point, the denial of transportation funds, applied only to city school districts such as Detroit.

The reason these and other "Detroit-only" laws existed finds its roots in the state's school district classification system, which grouped districts by student population. Class I applies to districts with over 150,000 pupils and since Detroit is the only school district in Michigan fitting that description it became easy for the legislature to direct legislation at it. In order to pass a law aimed toward Detroit, the legislators merely had to stipulate that the act applied to Class I school districts only. Similarly, to exclude Detroit from a particular law or appropriation it was only

necessary to earmark the legislation for Class II, III, and IV school districts.[23] As one Detroit school administrator put it, "Detroit's Class I status gave it second class citizenship."[24]

In Michigan as in other states, the movement of the population from rural to urban areas did not result in a shift from rural to urban control of the legislature. Instead, the declining proportion of rural seats was matched by an increasing proportion of seats occupied by representatives from expanding suburban communities. Many of these suburban legislators represent constituents who left the city because of increasing racial isolation and therefore are not predisposed to act favorably toward a metropolitan desegregation plan in Detroit. A source in Detroit remarked that "These gentlemen are bent on erecting fences between their communities and the city of Detroit rather than coming to grips with the desegregation problem."[25]

Two actions by the Michigan legislature illustrate the attempt to build roadblocks to desegregation. The first of these was a 1971 resolution adopted by an overwhelming vote of the legislature aimed at amending the United States Constitution "to prohibit busing to achieve racial integration."[26] The second action was the passage of a "school control amendment to the Michigan constitution which "strips the State Board of Education of its authority and makes it an advisory group to the Legislature."[27] This action was proposed to deal with Judge Roth's decision to have the "State provide the remedy." Thus Roth was significantly different than the Richmond case which had been overturned partially because the Court there had provided the remedy itself. The Michigan amendment would leave the remedy in the hands of the legislature rather than the SBE.

The legislature demonstrated its intent to comply with certain specifics of the Roth ruling. In 1971, the legislature raised Detroit's

capital improvement bonding authority from three to five per cent. Similarly, it made it legally possible for Detroit to receive the transportation funds it had been previously denied. Unfortunately, the measure was not accompanied by an increase in the appropriation for such transportation funds that recognized that one-sixth of the state's pupils attend Detroit schools.

Governor Milliken, a defendant in the case, carefully sidestepped the Detroit controversy except in his decision to appeal the Court's ruling. He seemed opposed to any solution which involved long distance busing. When asked about busing, the Governor once remarked, "I don't see how students can learn that much from riding on a bus for an hour."[28]

Much more at the center stage has been State Attorney General, Frank Kelley, who has been involved in the controversy from the beginning, also as a defendant. Throughout his numerous appeals at every step of the judicial process Kelley has maintained that the State of Michigan "was not guilty of segregation."[29] On this point the courts have consistently ruled to the contrary leading various defendants to take an "it wasn't we--it was they" stance in their appeals.[30] Prior to reaching the United States Supreme Court the differing opinions of the courts have been on the issue that not all the suburban defendant districts were heard in the proceedings and that they were entitled that right before a final ruling.

Kelley's defense of the State has been so adamant that he considered stopping payment to the Roth Panel, an order which the Court gave to the State. At the time, however, his staff members convinced him that it might not be wise to act contrary to the edict of a Federal Court.[31]

How much of Kelley's actions were politically inspired is uncertain, but it should be pointed out that at the height of the controversy Kelley

was running against U.S. Senator, Robert Griffin, for the latter's seat. That campaign boiled down to one issue; who was more against busing, Griffin or Kelley? In the course of the campaign it was pointed out by the Griffin forces that Kelley had been identified with a pro-busing position paper in the state as late as 1971. Kelley retorted to the effect that Senator Griffin allegedly favored busing as long as it occurred only in the Southern states.[32] Prior to the election Kelley took the unprecedented step of personally arguing the case before the Sixth Circuit Court of Appeals in Cincinnati.[33] Since the campaign Kelley has maintained a consistent anti-busing stand.

State Superintendent John Porter has for the most part confined his activities to compliance with the Court's directives. It would be unfair to characterize the compliance as minimal since Porter and his staff, while working under a forty-five day time limit, produced two complicated documents that outlined a plan for administering the proposed desegregation area. They prepared the recommendations with the full knowledge that the implementation of the plan might never occur or be delayed for several years because of litigation. Even so, Porter recognized early that the case was a matter for the Courts.

The State Department itself formally did little to assist the Detroit schools or the Roth panel. They did however, provide public record documents to the panel. The Department also paid the expenses of outside consultants who worked with the panel. The Detroit staff and some panel members received "informal assistance" from SDE officials with whom they had rapport. Detroit administrators characterized their relationship with the SDE officials during the desegregation controversy as a manifestation

of the "other state syndrome," implying that Detroit is not part of the Michigan regularly serviced by the SDE.[34] This type of relationship may be changing as a result of the fiscal crisis of the Detroit schools during 1972-73.

The role of the State Board of Education was alluded to during the chronology of the Detroit case. The SBE had chosen to appeal the Court's desegregation ruling and the decision to appeal reflected the same bloc of votes as the decision to submit six desegregation plans without priority. The Court felt that the submission of six plans was less than minimal compliance.

As far as busing was concerned, the SBE went on record in late 1971 that it would not recommend "any plan that would endanger the schooling and well being of any child."[35] The statement shows the SBE to prefer the middle of the road, rather than taking a firm position on busing. One source suggested that the SBE might "stiffen its backbone" once a decision was reached by the United States Supreme Court. It was apparently in anticipation of this possibility that the Senate passed its constitutional amendment to diminish the SBE's powers in 1972.

Some of the interest groups were involved in the Detroit case at various stages but their influence has been minimal. The Detroit Federation of Teachers was one of the original defendants. Many members of the MASB have been interested in the case because of their strong belief in "local control." Since fifty-three suburban Detroit districts were brought into the case, their local board members have been directly involved as have the Detroit board members.

The MEA entered the case as an Amicus Curiae, "friend of the court," after Judge Roth's ruling for a metropolitan solution. Their involvement

seemed to be motivated by the desire to protect the contractual rights of the teachers in the desegregation area.

FOOTNOTES

[1]"Position Paper on School Desegregation," State Department of Education, Lansing, Michigan, 1971, p. 2.

[2]1963 Michigan State Constitution, Article VIII, Section 3.

[3]Ibid., Article II, Section 8.

[4]Michigan General School Law, (Section 340.355).

[5]"Position Paper on School Desegregation," op. cit.

[6]Ibid., p. 5.

[7]Ibid., p. 10.

[8]"Proposed Desegregation Criteria for Public Schools in Michigan," State Department of Education, Lansing, Michigan, 1972, p. 3.

[9]"Desegregation," Rank of States, Educational Governance Project, Columbus, Ohio, 1972.

[10]Interview with Detroit Board members, Educational Governance Project, January 1973.

[11]Bradley v. Milliken, 433 F. 2d 897.

[12]Ibid.

[13]Ibid.

[14]Ibid.

[15]Ibid.

[16]The Teacher's Voice, Michigan Education Association, Lansing, Michigan, Volume 49, No. 6, November 29, 1971, p. 3.

[17]Ibid.

[18]Bradley v. Milliken, F. 2n - (1972), cert. denied.

[19]The Teacher's Voice, Michigan Education Association, Lansing, Michigan, Volume 49, No. 10, February 14, 1972, p. 3.

[20]Ibid.

[21]Bradley v. Milliken, F. 2n - (1972), cert. denied.

[22]Interview with Detroit Board member, Educational Governance Project, January 1973.

[23]Bradley v. Milliken, 433 F. 2d 897.

[24]Interview with Detroit school administrator, Educational Governance Project, January 1974.

[25]Ibid.

[26]The Teacher's Voice, Michigan Education Association, Lansing, Michigan, Volume 49, No. 5, November 15, 1971, p. 2.

[27]The Detroit News, October 8, 1972.

[28]The Teacher's Voice, November 15, 1971, op. cit.

[29]Interview with Detroit Board member, Educational Governance Project, January 1973.

[30]Detroit Free Press, August 24, 1972.

[31]Interview with Roth panel member, Educational Governance Project, January 1974.

[32]Lansing State Journal, October 6, 1972.

[33]The Detroit Free Press, August 25, 1972.

[34]Interview with Detroit school administrator, Educational Governance Project, January, 1974.

[35]The Teacher's Voice, November 15, 1971, op. cit.

SECTION V

THE EDUCATION ASSESSMENT PROGRAM - A POLICY ISSUE AREA

> In simplist terms, we believe accountability is the guarantee that nearly all students without respect to race, geographic location, or family socioeconomic status, will acquire the minimum school skills necessary to take full advantage of the adult choices that follow successful completion of public education. If we, the professionals in education, fail on this promise, we will publicly report the reasons why.[1]
>
> John W. Porter, Michigan Superintendent of Public Instruction

State Department Initiative

In recent years accountability has become an important education issue in many states. As of August 1973, twenty-seven states had enacted laws featuring some aspect of educational accountability.[2] The state of Michigan, however, stands out among the states as being "... further along than any other state in developing and using assessment as a part of an educational accountability model."[3] The initial effort by the proponents of educational accountability in Michigan was fraught with controversy and opposition. However, as of January 1974, many of the original problems had been ironed out and the assessment program was still considered to be a vital part of Michigan's effort to assure equal educational opportunity to all of its students.

Many of the publications centering on the topic of accountability, in Michigan as well as in other states, conclude that the original societal force for educational accountability came in the form of a questioning of public education by rebellious taxpayers. Asked during the 1960s to increase greatly the dollars being expended for education, citizens began to ask "What are my dollars going for?" They demanded to see the results of

their increased dollar input into education in terms of measurable education outcomes. It was the apparent inability of educators to respond to these demands that initiated the accountability movement in many states, Michigan being one of them.

A probable force in the origins of statewide testing in Michigan was the J. Alan Thomas study of the Missouri schools.[4] This study, completed in 1966, included a recommendation that a reading test be administered to fourth grade students. This proposal prompted considerable thinking and discussion in Michigan.

In response to a questioning citizenry, staff members in the Michigan Department of Education's Bureau of Research prepared a paper in late 1968 suggesting that the Department undertake a statewide testing effort.[5] Becuase of the potential controversial nature of this proposal, the paper was given only to Ira Polley (the State Superintendent of Public Instruction at that time) and to one of his assistants. Polley's immediate reaction to the paper was very positive, and he began to consider possible ways of securing funding from the state legislature for a testing program. He decided that the two most viable possibilities were: 1) to introduce legislation both mandating the program and providing the necessary funds, or 2) establish and fund the program simply by adding a line item to the Department's annual budget for operations.[6] When the program was finally introduced to the legislature the decision was made to ask for a line item addition.

While the Michigan Department of Education staff initiated the assessment proposal, State Board of Education members had actually been concerned with another aspect of accountability for some time. A number of the Board members had felt strongly that the function of accrediting elementary and

secondary schools should be removed from the University of Michigan and placed with the Department of Education. Polley, after reviewing the Department's assessment proposal, decided early in January of 1969 that he would present the assessment motion to the Board as a more producting means of accomplishing educational accountability than the transference of the accreditation function from one institution to another.

Before Polley presented the assessment idea to the Board, several significant events occurred. First, the proposal written by members of the Michigan Department of Education's Bureau of Research was circulated among Department staff members in an attempt to build a consensus concerning an idea which would be viewed by many people as being highly controversial.[7] Second, the executive heads of four education interest groups were informed that an assessment proposal was going to be presented to the State Board of Education. These four groups were: The Michigan Education Association, The Michigan Federation of Teachers, The Michigan Association of School Administrators, and the Michigan Association of School Boards.[8]

Ira Polley, in a memorandum to the State Board of Education, publicly presented the assessment proposal to the Board of January 28, 1969. An excerpt from the memorandum is as follows:

> ...reliable information concerning the progress of education in Michigan is not available. It may be suggested that a periodic assessment of educational progress for the state could enhance the ability of educators and citizens to improve the quality of their schools. Such an assessment could consist of the statewide analysis of instructional outcomes--as these outcomes vary according to the differing social, geographic, and economic patterns of the state. The assessment would be developed, conducted, analyzed, and interpreted by the State Department of Education. It would include procedures to assess the knowledge, understandings, and attitudes of the pupils who are attending the various public schools in Michigan. The results of each periodic assessment...would permit a knowledgeable movement towards increased educational opportunity in the state through a continued identification of areas of educational disadvantage.[9]

In the same memorandum, Polley indicated that the assessment effort would have two purposes. The overriding purpose would be to provide educators, legislators, school board members, and citizens in general with comprehensive information concerning the educational progress of students. The second purpose, cited by Polley, would be to improve the basis for educational decision making in Michigan.[10]

The Board responded to Polley's memorandum by adopting a resolution favoring a statewide assessment program and by asking the Department to develop the details of a statewide assessment plan which would serve as the basis for legislation.[11] The next memorandum from Polley to the Board outlined a three-year planning period prior to the full implementation of a testing program. The Board, however, felt a need for more immediate action and asked for a plan which could be implemented the following school year (1969-70). After several more Board meetings a compromise was finally reached. The program was to begin with an assessment effort at two grade levels for the school year 1969-70, and it was to be fully implemented over a three-year period.

Legislative Action

As was mentioned before, the decision was made by the Department to request the assessment legislation by asking for a line item addition in the Department's budget bill. On August 12, 1969, the Governor signed the budget bill with the inclusion of the assessment provision. One close observer made the following comment concerning the legislative route of the assessment plan: "The program's journey through the actual legislative process was fairly low-key, marked with no great fanfare, and characterized by gentle persuasion rather than intensive lobbying."[12]

The assessment plan came under Section 14 of Act 307 of the Public Acts of 1969 and was funded at the level of $248,854. The Michigan Department of Education was given the mandate to undertake: 1) the planning and development of a statewide program for a periodic and comprehensive assessment of educational progress, and 2) the immediate assessment of certain basic skills at one or more grade levels during the 1969-70 school year.[13]

Primarily as a result of the time constraint imposed by the legislation, the Educational Testing Service of Princeton, New Jersey, was hired by the Department to assist in developing and administering the assessment batteries and data gathering instruments, and in analyzing the findings. It should be reinforced that Polley and the Department staff had felt strongly that a three-year planning period was absolutely necessary before an assessment program could be implemented. The Board's insistence that tests be administered during the 1969-70 school year allowed the Department almost no alternative other than that of seeking oustide assistance. The basic skills batteries (for reading, English expression, vocabulary, and math components) were designed to be given to all fourth and seventh grade students. It should be noted that instruments selected for 1969-70 were designed to be reliable for groups of students, but not for individual students. These skills batteries were to require approximately 100 minutes of testing time. Twenty additional minutes were to be utilized for a questionnaire ("Pupil Background Questionnaire") designed to acquire information on socioeconomic background and pupil attitudes.

In September of 1969, the Department organized an ad hoc group composed of classroom teachers, curriculum consultants, and a parent. This group was 1) to review the assessment battery in terms of its relevancy to current curriculum, and 2) to review the relative emphasis placed on sub-areas under each of the sub-tests.

Also, in order to maintain communication with local school districts, the State Superintendent asked that a local district coordinator for the Michigan Assessment of Education be designated in each school district. The primary purpose of this person would be to serve as liaison between the school district and State Department of Education for all matters pertaining to the statewide assessment program.

As we have seen, the assessment legislation was initiated by the Michigan Department of Education and by the State Board of Education. Subsequently, the legislation was passed (with funding) by the legislature with little or no political complications. Complications and controversy of a political nature did occur, however, when the Department began to release the reports of the 1969-70 round of tests.

To back up a bit, the Department and Superintendent Polley had decided in the initial design of the 1969-70 program that the Department would not publish any ranking or comparative report regarding the 1969-70 assessment results in local school districts. Rather, the school districts were to be categorized into one of five community types and into one of four geographic regions. Only broad based comparisons would be made from the data; none of the school districts would be identified individually. Also, the Department went on record as stating it would not release data on individual school districts to anyone but local school administrators.[14]

Shortly after the Department released the assessment scores to the school administrators regarding their respective school districts, legislators, the Governor, and the press began to urge the Department to release the data publicly. Governor Milliken, who had been consistently supportive of the assessment program, requested that a single comparative report of the assessment results be sent to his office. Many requests came to the

Department from legislators who wanted the assessment results for their districts. Finally, numerous press releases throughout the state pushed for the release of test results to the public.

These pressures for public disclosure of data produced, in the meantime, counterpressures from local school district superintendents. The superintendents contended that the Department had stated in the original agreement that test results would be released only to school officials and not to the general public, and that any change in this plan would imply the Department had backed down on its word. The Department was placed right in the middle of a controversy of a highly emotional and political nature.

In the midst of this controversy however, an earlier piece of legislation was evoked to solve the Department's difficult dilemma. During the 1968 legislative session a section was added to the State School Act which established a categorical aid program designed to assist schools marked by a high degree of economic and cultural deprivation. During the 1968-69 academic year, $6.3 million in compensatory aid was allocated to forty-seven Michigan schools on the basis of criteria established by the Department. The program was continued, at a higher level of funding, the following year. However, in 1970-71 the criteria for funding were changed dramatically by the state legislature.

The legislature raised the level of funding of the 1970-71 State School Aid Act to $17.5 million. Following is a brief description of the important funding criteria changes found in the Act:

> Section 3 of the 1970-71 State School Aid Act requires the employment of two criteria to determine eligibility for funding. The criteria require that, within attendance areas of individual schools, there is enrolled: (1) a high percentage of students with socioeconomic deprivation; and (2) a high percentage of students

> with low achievement levels. The legislation further provides that the results of the 1969-70 statewide assessment effort for grade 4 be employed to determine a school's relative standing on these two criteria. A school falling in the bottom quartile on composite achievement received points in relation to its rank within that quartile--one point if it were at the 25th percentile, twenty-five points if it fell at the 1st percentile. In addition, a school falling in the bottom quartile on relative socioeconomic level also received points--from one to ten points, depending upon its percentile ranking.[15]

Because this legislation required a ranking of school districts based on assessment results (and socioeconomic standing) as the basis for compensatory funding, the Department was thus forced to compile and release publicly comparative assessment results. The Department, then, did end up releasing local school district scores to the public. The State Board of Education backed up the Department in its action and also stated that the scores for the 1970-71 school year would be made even more useful and open to the public.[16]

Nature of the Controversy

The controversy surrounding the Michigan assessment program described so far had resulted primarily from the reporting of the test results, however, this was not the only subject of controversy. Opposition to an equal or even greater degree arose from various segments of the public about the construction and content of the tests.

Section I of the tests consisted of twenty-six questions designed to provide measures for: 1) socioeconomic status, and 2) pupil attitudes and aspirations. Shortly after the testing had begun in Detroit a strong protest emerged from the parents from a few of the city's inner city elementary schools. They protested against Section I "...on the basis that it was racist, uncalled for, and an unwarranted invasion of privacy."[17] The press quickly spread the story across the state, and in some instances

districts, of their own accord, deleted that section of the battery. The issue, in fact, went all the way to the State Legislature where a debate took place on the subject. In time, however, emotions subsided and Section I continued as a part of the 1969-70 assessment program. In 1971-72, however, this section of the battery was deleted. (See Table 21 for a chronology of testing and reporting in Michigan.)

TABLE 21

A CHRONOLOGY OF TESTING AND REPORTING FOR THE MICHIGAN ASSESSMENT PROGRAM

August 1969:	Initial authorization of the Michigan Assessment program (as a line item on the Department of Education's 1969-70 appropriation bill). The Educational Testing Service of Princeton, New Jersey, was called upon to assist the Department in devising, administering, and analyzing the tests.
January 1970:	First tests administered to students. Vocabulary, math, reading, and English skills were tested. Also administered was a "Pupil Background Questionnaire."
June 1970:	Report summarizing results by region and community type was released to public.
January 1971:	Second administration of tests. Test was lengthened to permit reliable scores to be reported for individual pupils. Socioeconomic items were revised extensively.
March 1971:	Reports released to local educators.
February 1972:	Reports released to public.
January 1972:	Third administration of tests. No attitude or socioeconomic items included.
November 1972:	Local district results released to public in percentile form.
April 1973:	Fourth (and last) administration of normative tests.
1973-74:	(Criterion) objective referenced tests administered for first time. No reports released as of January 1974.

SOURCE: Bettinghaus, Erwin and Miller, Gerald, "Reactions to State Accountability Programs," Cooperative Accountability Project, Denver, June, 1973, pp. 18-22.

Charges were also made, again at a highly emotional level, by a number of legislators that certain reading passages used in the testing were communistic and racist. Again, discussion reached the floor of the legislature, this time with the appearance of resolutions in both houses calling for a moratorium on the testing program. Again, however, the emotionalism abated and both resolutions were halted before reaching the floor for consideration.

Governor Milliken, long an advocate of the educational assessment concept, vocalized his concern that the 1969 assessment program did not furnish individually reliable pupil scores. Individual scores, he felt, were essential if local school administrators were to benefit from assessment by being provided data which would enhance local decision making. The Governor, through the work of his Commission on Educational Reform, which was established in 1969, submitted a bill to the legislature in 1970 designed to give the assessment effort its own basis in statute as well as to ensure that individually reliable pupil scores would be provided by the tests. The bill was signed into law by Governor Milliken as Act No. 38 of the Public Acts of 1970. The thrust of the initial law was changed in that the two basic purposes of the assessment program (to provide information useful in making allocatory decisions and to enhance local decision making capability) would now receive equal emphasis.

In the latter part of 1969, Superintendent Polley resigned his position and John W. Porter was appointed State Superintendent of Public Instruction. While Porter did inherit the controversial assessment issue from his predecessor, Porter himself became a strong advocate of the assessment concept. In fact, he led the Department and the State Department of Education in the development of a full-scale accountability model for Michigan. The

new state accountability model consisted of six major "thrusts," assessment being one. They are:

1. Identification, discussion and dissemination of common goals for Michigan education.

2. Approaches to educational challenges based on performance objectives consistent with the goals.

3. Assessment of educational needs not being met, and which must be met to achieve performance objectives and goals.

4. Analysis of the existing (or planned) educational delivery systems in light of what assessment tells us.

5. Evaluation and testing within the new or existing delivery system to make sure it serves the assessed needs.

6. Recommendations for improvement based upon the above.[18]

Opposition to various aspects of the assessment program continued to plague the Michigan Department of Education as the testing went into its second and third years. In 1971 forty-one superintendents, with the approval of their boards of education, threatened to withhold their test results unless the Department would answer some of their questions about the assessment program:[19]

> Eventually, all districts did report scores to the State Board of Education, but only after much correspondence had passed between the superintendents and officials of the State Department of Education. Many of the questions raised in this correspondence were concerned with the eventual use that would be made of the data and with the "image" that "poor" results might impose on the district and thus on the administrative staff.[20]

The teacher associations responded, at both the state and local levels, to the assessment program, and in general the groups opposed the use of assessment tests.[21] Following are excerpts from a resolution passed by the Michigan Education Association in 1972:

> The Michigan Education Association views with growing concern the misuse of standardized achievement tests in the State of Michigan. After three years of using tests in the state assessment program, no significant contribution to knowledge has been made as a result of that program. The current Michigan assessment program is expensive, unproductive, and tends to mislead the public ...

> Therefore, be it resolved that the Michigan Education Association opposes vigorously the use of standardized achievement testing for purposes which do not benefit the child and may be harmful to his welfare.[22]

Summary and Analysis

We have seen that the Michigan Educational Assessment Program was initiated by the Department of Education, the State Board of Education, and the State Superintendent of Public Instruction (Ira Polley). While the initial 1969 legislation was passed with little publicity or difficulty in the legislature, the program itself became enmeshed in controversy shortly after it was implemented. It seems highly possible that much of this controversy could have been avoided had the Department been allowed an adequate amount of time for planning, test development, and the involvement of various segments of the public in initial activities and decision making. Pressure from the Board of Education forced the Department to rely heavily on an outside source (the Educational Testing Service) for the development of the 1969-70 tests.

The Governor played an active role in the policy-making process for Michigan educational assessment. He supported the concept of assessment and signed the 1969 legislation into law. He also initiated the 1970 accountability legislation (which gave assessment its basis in statute) through his Commission on Educational Reform.

The Michigan Legislature also effected changes in the original assessment legislation by mandating that compensatory education funds be based partially on assessment data. This legislation caused a major change in the original legisiation in that it forced the Department to release assessment results publicly rather than solely to local school district administrators.

Among those who opposed various aspects of the assessment program were the Governor, individuals or groups of parents, local school district superintendents, teachers, and legislators. The complaints expressed by these groups were often charged with emotion. In many cases, however, complaints were substantiated in fact, and changes were made in the data-reporting procedures, and in the content and construction of the tests.

As John Porter became chief state school officer in the state of Michigan, the assessment controversy continued. Assessment did manage to survive the battles, and, in fact, the assessment concept was expanded by Porter into a large scale statewide accountability program in the early 1970s. In 1974, the accountability and assessment programs continued to be alive and well in Michigan. As was expressed in the quote by Porter which opened this section, these programs form the philosophical as well as the practical foundation for the ultimate goal of equal educational opportunity for all of Michigan's students.

FOOTNOTES

[1]Porter, John W., "The Accountability Story in Michigan," Phi Delta Kappan (October 1972), p. 98.

[2]Hawthorne, Phyllis, Legislation by the States: Accountability and Assessment in Education. Cooperative Accountability Project (Denver, Colorado), Report No. 2, p. vii.

[3]Erwin P. Bettinghaus and Gerald R. Miller, "Reactions to State Accountability Project," (Denver, Colorado: June 3, 1973), p. 18.

[4]Thomas, James Alan, Looking Ahead to Better Education in Missouri, New York: Academy for Educational Development, 1966.

[5]C. Philip Kearney, "The Politics of Educational Assessment in Michigan." Paper delivered at meeting of AERA in Minneapolis, Minnesota, March 5, 1970, p. 5.

[6]Ibid., p. 6.

[7]Ibid., p. 8.

[8]Ibid., p. 8.

[9]Memorandum from Ira Polley, State Superintendent of Public Instruction, to the State Board of Education (Michigan: January 28, 1969), p. 4-5.

[10]Ibid., p. 5.

[11]Kearney, op. cit., p. 9.

[12]Ibid., p. 12.

[13]Memorandum from John W. Porter, State Superintendent of Public Instruction, to the Michigan State Board of Education, November 3, 1969.

[14]Kearney, C. Philip and Huyser, Robert J., "The Michigan Assessment of Education, 1969-70: The Politics of Reporting Results." Paper delivered at Annual Meeting of American Educational Research Association, February 1971.

[15]Ibid., p. 16.

[16]Ibid., p. 17.

[17]Kearney, "Politics of Educational Assessment in Michigan," op. cit., p. 13.

[18]"A Position Statement on Educational Accountability for Improved Instructional Services at the Elementary and Secondary Levels in Michigan," Michigan Department of Education, Lansing, Michigan, October 11, 1971, p. 2.

[19]Bettinghaus and Miller, op. cit., p. 40.

[20]Ibid., p. 40.

[21]Ibid., p. 36.

[22]Ibid., p. 37.

SECTION VI

THE POLICY ROLES

The Chief State School Officer

John W. Porter became Michigan's Superintendent of Public Instruction in 1969 after having served in an interim appointment as Acting Superintendent following the departure of his predecessor, Ira Polley. Prior to that, Porter had served as Associate Superintendent for Higher Education, and in fact, had earned his reputation more in higher education affairs than in the administration of Michigan's public elementary-secondary schools.

Several respondents believed Porter moved into the Superintendency at a time when "they (the SBE and SDE) were desperately in need of a good administrator to get them out of some difficulty." One of those difficulties apparently had to do with CSSO-SBE relationships since prior to 1969 there appeared to have been a fair amount of conflict between the Board-appointed Superintendent and the elected Board members themselves.

CSSO-SBE Relationships

There is some question as to how much "searching" the Michigan Board of Education did after naming Porter Acting Superintendent. Some respondents indicated that, given Porter's record as a thorough and competent administrator, there was little need to look further...Porter was a natural choice. Other respondents seemed to be saying that Porter got the permanent appointment by default. Comments were made to the effect that "John wasn't really known that well, so there wasn't really any opposition (to his permanent appointment.)" He "...didn't have unanimous backing but that didn't mean necessarily opposition either." Others indicated that Porter's appointment was helped along in light of the fact that the SBE did not seek much, if any, real outside advice in selection.

Whether Porter was the most logical and best possible choice for Superintendent, or whether he won appointement largely by default became an academic question. The State Board was apparently dissatisfied with the state of affairs as of 1969 and expected "John...to get things moving...to get things under control. There wasn't much happening."

Much of the evidence, as of 1972, indicated that Porter had met the expectations of the Board and had gone even further to provide real leadership to their discharge of responsibilities. For the first year or so of his tenure, Porter moved to gain control of SDE administration and program activities or, as one Board member more bluntly commented, to do some "kicking" in the right places to get his SDE colleagues "moving."

Porter's leadership has been further evidenced by the clear perception and expectation that "80% of the time the SBE is reacting" to proposals coming from the CSSO and SDE. Such leadership opportunities are perhaps even more available in Michigan than elsewhere, in that Porter serves as Chairman of the eight member Board, albeit without voting privileges. As Chairman, Porter is in an excellent position to set the agenda for conducting Board meetings, although Board members largely felt they had ample opportunity to propose additions and deletions prior to adoption of the agenda.

The Michigan Board clearly believes that Porter and his staff do a rather good job in providing information on matters requiring a State Board decision. One Board member particularly emphasized the "good assessment of the Board's needs" on the part of the CSSO-SDE. Only one Board member interviewed commented negatively on the quality of information provided them, while the consensus rated the SDE staff including the CSSO as "excellent."

TABLE 22
SBE PERCEPTIONS OF THE
QUALITY OF CSSO-SDE INFORMATION (N=6)

Descriptor	Frequency of Response
Almost always meets my needs	2
Usually meets my needs	3
Sometimes meets my needs	1
Almost never meets my needs	0

While it appears that there have been a number of times when Porter could not get the support of the full Board, this did not seem to bother either the CSSO or the Board members in any significant way. Data from respondents outside the SBE and SDE indicated that "it's Porter's Board, but not a rubber stamp either." Comments of this kind support an analysis that the Board contains a working majority which largely supports the CSSO over time and issues. A small minority (one or two) of the Board were described as trying to "snipe at John" to "make him look bad", but little evidence of success in doing so was found. Rather the CSSO's careful timing of issues to be brought to the Board, and the depth of SDE information on those issues, have contributed significantly to John Porter's effective Chairmanship. On the matter of timing, one of Porter's critics outside the SBE-SDE said that "his modus operandi is to present an extremely complex paper, recommend that it be received, hold a 'study session' with no action, present alternatives two or three months later, and still later bring it to a vote when everyone had forgotten what it was all about."

CSSO-Legislature Relationships

The relationship between the CSSO and the legislature in Michigan is a function not only of Porter's personal appearances and contacts, but also of the larger context of State Department activity on legislative issues. Liaison

activities are built into the State Department structure and, in 1972, were coordinated by the legislative liaison, Roger Tilles.

These activities included: recommending improvements in the language of the law; providing information and statistics relevant to pending legislation; attending Education and Appropriation Committee hearings; drafting bill analyses of the educational implications, as seen by the SDE, of roughly five hundred education bills per session.

While Tilles, Associate Superintendent for Business Robert McKerr, and other department heads quite naturally carried most of the "normal" SDE legislative load, Porter himself played a significant role in establishing relationships with the legislature. In his own words, Porter was in "almost daily" contact with legislators during the 1972 session. Such intensive effort apparently was rewarded with a rather high rate of return on SDE sponsored legislation. During 1972, of the thirty bills introduced on behalf of the SDE, twenty-eight finally emerged in some form as state law. Yet Porter contends that he is "not really a politician" but tries simply to "deal in honesty and facts" and, with some exceptions, is viewed that way by legislators.

Comments from legislators about Superintendent Porter typically were along the lines of "extremely impressive, competent, and qualified" and "a good source of factual information". One legislator noted that Porter "doesn't lobby, he just gives the facts". Yet, that same respondent later commented that "he must be a pretty smart politician." But, depending on one's point of view, the legislative perspective of the SDE might not be as positive as the SDE thinks it is.

For example, while the SDE pointed with some pride at "succeeding" with twenty-eight of thirty sponsored bills, legislators generally did not see the State Department as that successful.

TABLE 23
LEGISLATORS' PERCEPTIONS OF
CSSO SUCCESS IN GETTING PROPOSALS
ENACTED BY THE LEGISLATURE (N-14)

Descriptor	Frequency of Response
Almost always successful	0
Successful most of the time	4
Successful about half the time	8
Successful less than half the time	1
Almost always unsuccessful	1

Legislators were in strong agreement that Porter and his staff (McKerr, Tilles, and others) were in frequent, if not daily, contact with them via formal committee meetings, testimony, written bill analyses and information, as well as more informal contacts. But there also appeared to be some doubt in legislators' minds as to whether such high communication levels corresponded with the value of the information.

TABLE 24
LEGISLATORS' PERCEPTIONS OF HOW OFTEN
INFORMATION FROM SDE MEETS THEIR NEEDS (N=15)

Descriptor	Frequency of Response
Almost always meets needs	3
Usually meets needs	6
Sometimes meets needs	5
Almost never meets needs	1

Part of the difficulty in getting an accurate "reading" of the relationships between the CSSO and the legislature is related to the fact that the CSSO cannot be viewed wholly apart from the SDE-SBE surrounding him and the larger arena of educational politics in Michigan. It appeared that, on a personal basis, most legislators had a great deal of respect for the competencies

and personality of a skillful Chief State School Officer. There was evidence that legislators held Porter himself in higher regard than the SDE "bureaucracy" generally, and most certainly in higher regard than the SBE which he chaired. The State Superintendent was generally seen as a competent professional, unafraid to speak out in non-partisan fashion on critical educational issues. In addition, it helped considerably to have Porter take positions largely consistent with most legislative leaders on questions like accountability. (Porter's critics in interest groups and local school districts would later comment that such compatibility with known legislator views was by design.)

Given the traditional fragmentation of educational politics in the state, however, one might also argue that Porter has done well to secure as much legislative support as he has. In any event, the CSSO has been no less than at least moderately successful in his relationship with the Michigan legislature.

CSSO-Governor Relationships

If the relationships between John Porter and the legislature are at least reasonably good, the CSSO-Governor relationship is probably even better. Respondents in both the SDE and Governor's staff, as well as the CSSO and Governor personally, indicated that the two men are in "frequent" contact to exchange information and advice.

The Governor considers Porter among his "most important sources" of information and advice on educational matters and the relationship between them appears to be very good personally as well as professionally. The Governor is unreserved in his praise of Porter as an "intelligent, committed, honest educator with a great deal of common sense."

The CSSO is viewed by respondents from the Governor's staff as being "listened to and respected" in the legislature, at least in part because of a bi-partisan approach that is forceful but not threatening. This positive

attitude towards Porter exists "in spite of" the fact that the Governor for some time favored abolition of an elected State Board with the CSSO to be appointed by the Governor.

Communication is regular between the CSSO and Governor and their respective staffs in part because the Governor's representative. James Phelps, fulfills the ex officio non-voting responsibility of meeting regularly with the State Board in official session. Good CSSO-Executive branch liaison is promoted by the fact that the Governor has been viewed by nearly everyone as being "strongly for education." The State Superintendent, Department, and Board have thus enjoyed a largely friendly ear in the Governor's office when drawing up and submitting appropriations recommendations for inclusion in the budget message.

Such analysis of CSSO-Governor relationships was largely supported by other participants in the state policy making system who observed that, as much as anything, the two men were simply of "like mind" on critical issues such as accountability in the public schools.

CSSO-Educational Interest Group Relationships

Leaders of the four major educational interest groups in Michigan (MEA, MFT, MASA, MASB) were, among all respondents, the most critical of the State Superintendent. Porter himself acknowledged that at least some conflict existed between the groups and his administration, although he put it softly in terms of "Perhaps we have not worked as closely as we should (with EIGs)."

This is not to say that EIG leaders underestimate Porter's ability and influence. They do view him as an important source of ideas and advice to the Governor, for example. Group leaders noted that Porter "probably cultivates this relationship with the Governor...but they have similar philosophies anyway." Both factors were seen by group leaders as contributing to the good

relationship and mutual respect. The view that the CSSO "has been co-opted by the Governor and is really following the Governor's lead rather than the other way around" was taken by one group leader, although this was a minority viewpoint, indeed.

TABLE 25
EIG LEADER PERCEPTION OF CSSO'S IMPORTANCE TO GOVERNOR AS SOURCE OF IDEAS AND ADVICE (N=8)

Descriptor	Frequency of Response
Single most important source	1
Among most important sources	6
A minor source	1
Not at all important as a source	0

The group leaders also <u>generally</u> respect Porter's ability in the legislative arena as well, characterizing him as "quite sensitive to what legislators are thinking about." In addition, the "SDE has an advantage in pushing legislation, in that they have a large information bank."

TABLE 26
EIG LEADER PERCEPTION OF CSSO SUCCESS IN GETTING PROPOSALS ENACTED BY THE LEGISLATURE (N=9)

Descriptor	Frequency of Response
Almost always successful	2
Successful most of the time	3
Successful about half the time	2
Successful less than half the time	1
Almost always unsuccessful	0

But the fact that the EIG leader responses were broadly distributed may be explained in part by the view of some that Porter is "Machiavellian, hence he has initial success but then people realize they're being used."

If the group leaders gave the impression of resenting, if not being embittered by Porter's "tactics," such a reflection was intended and outspoken. The bitterness did not arise over not being consulted.

TABLE 27
EIG LEADER PERCEPTION OF THE EXTENT TO WHICH THEIR ORGANIZATION WAS CONSULTED BY CSSO IN FORMULATING POLICIES (N=8)

Descriptor	Frequency of Response
Always	0
Usually	7
Sometimes	1
Rarely	0
Never	0

Rather, the group leaders objected to the way in which they were consulted. One group leader appeared to voice the consensus in a comment filled with frustration: "On December 22 the groups were asked to respond to a very complex proposal they (the SDE) had been working on for months and we were asked to react in a week...by December 29...and over the Holidays yet! Needless to say I was really angry!"

Another group leader assessed this "tactic"--since it had been "used more than once"--as a "strategy to keep the interest groups so busy and off balance that Porter can do whatever he wants and get away with it." Still another said the "...consultation is patronizing and not sincere...it's 'after the fact' in many cases." More than one group leader gave the implied view of the "SDE as a factory turning out proposal after proposal faster than anyone can keep up." While some group leaders hinted that "in the last six months this approach may have started to change" the general view remained strongly negative, low on effective relations, and high on frustrations.

Nor is CSSO-EIG conflict limited only to procedures. Substantive differences between groups and Porter had to do with matters like state-wide

testing where one leader commented: "We're not opposed to accountability, but it has to be focused at the district or building level, not state-wide or even regionally," Further, Porter is seen by some group leaders as favoring "centralization" of programs, services, and control, while local group members understandably cling to "local control" as an article of faith.

As a result there is little doubt that EIG-CSSO conflict has arisen over both procedures and principles and, perhaps more significantly, strong criticism of the CSSO has been voiced by both teacher (MEA, MFT) and administrator (MASA, MASB) groups.

The State Superintendent in Summary

The State Superintendent appears to be an effective administrator, leading a board majority and securing board support for policies he desires with limited opposition. The CSSO also has been largely effective with both the Governor and legislature since: Porter has been bi-partisan and factual in his approach; his views on critical issues have been largely compatible with many others in legislative and executive branches; Porter has effectively anticipated the needs and attitudes of legislators; and in general the CSSO has been a highly skilled politician in the sense of "knowing what it takes" to get policies adopted most of the time. The single outstanding criticism, and perhaps weakness as well, has been the tactical if not substantive and uniform alienation of the major educational interest groups. Given Porter's strength with other state educational policy making system components, however, the groups have been able to do little more than "gripe" about their relationship.

The State Board of Education

The Michigan State Board of Education, as presently constituted, is a creation of the state's fourth constitution ratified in April of 1963. The

Board is composed of eight members who are first nominated by their party conventions and subsequently elected by the people for eight year terms. Hence two board members are elected each year, with other vacancies (e.g., due to death or resignation) filled by gubernatorial appointment. The duties of the Board are delineated by both constitutional and statutory language which obligate supervisory, planning and coordinating functions for public education, including higher education, in the state.

If one were to judge the effectiveness and importance of the part-time members solely on the basis of energy expended, the State Board would rank very high as a component of the state educational policy-making system. Board members indicate that they spend a week or more per month in: attending regular and special meetings; reviewing informational, committee, and ad hoc study group reports; keeping up with correspondence; and the host of other duties incidental to Board service.

TABLE 28
STATE BOARD MEMBERS' PERCEPTIONS OF TIME EXPENDED IN SERVICE AS A BOARD MEMBER (N=6)

Descriptor	Frequency of Response
Less than a day per month	0
A day or so per month	0
2-3 days per month	0
4-6 days per month	0
A week or more per month	6

The agenda and supporting materials for Board meetings are prepared by the Board Chairman (CSSO) and are received a week to ten days in advance of the meeting. While most Board members assert that they are free to add to and delete from this agenda rather freely, other respondents made a relatively strong case that the CSSO generally exerts the most influence in preparation of the agenda and is in a good position to "time" the presentation of items

according to the needs of his office and SDE generally.

While no respondents felt the Board was lacking in considering issues of substance and great importance to educational policy directions, there was some evidence that legal approval of routine items did take up a fair amount of the Board's time.

TABLE 29
STATE BOARD MEMBERS' PERCEPTIONS OF THE PORTION OF BOARD MEETINGS TAKEN UP BY LEGAL APPROVAL OF ROUTINE ITEMS (N=6)

Descriptor	Frequency of Response
Almost all	0
Three-fourths	0
Half	3
One-fourth	3
Almost None	0

Members indicated that about one-fourth to one-half of the Board's time was taken up in disposing of fairly routine items which nevertheless required Board action. A few Board members viewed these less important items as too "time-consuming" for their value, but overall this feeling did not seem to permeate the Board.

What <u>did</u> emerge as a more significant potential for conflict had to do with lines of division <u>within</u> the Board.

TABLE 30
STATE BOARD MEMBERS' PERCEPTIONS OF LINES OF DIVISION IN DECIDING A MAJOR POLICY ISSUE (N=6)

Descriptor	Frequency of Response*
Board is harmonious, little serious disagreement	0
Board is usually in agreement, but there are board members who sometimes dissent	1
Board tends to divide into rival factions, but there is a clear working majority on the Board	4
Board often is divided but the lines of division depend on the issue that is confronting the Board	5

*Responses totalled ten among the six SBE members interviewed because of multiple responses.

At least four members of the Board were unsure whether lines of division on the Board constituted "rival factions" or appeared to "depend on the issues." Some members were inclined to think that two persons on the Board disagreed with the majority often enough to constitute a rival (and minority) faction. When pressed to give some reason why this was so, one respondent commented, "I don't know what their problem is. Maybe they just like to make waves." Another respondent felt that the minority faction was critical not so much of other Board members as of the CSSO "when he recommended what he thought was right, rather than politically expedient." Other members were inclined to think that disagreements varied according to the issue "based upon our individual differences." In any event, it was clear that at least a working majority of the Board rather consistently followed the CSSO's "lead" across issues.

If the Board sees itself as having some disagreement internally, the members agree in their perception of the Board's relationship with the legislature. The Board clearly believes it makes recommendations and takes positions on educational issues which are communicated to the legislature. Likewise, there is no doubt that the predominant channels of communication in this regard are through the CSSO and his staff, even though some Board members work at maintaining contacts with individual legislators.

Board members believed that Board influence with the legislature has grown, primarily through the State Superintendent. However, at least two Board members indicated that some contact is made "within party lines" and/or "party caucuses," stemming from the fact that Board members are nominated for election to the Board by party conventions in the first place. The majority view, however, would not support any claim to effective communication with the legislature outside of CSSO-SDE channels.

The opinions of legislators themselves support some of these beliefs, but in other areas there were contraditions. Legislators almost unanimously agreed that the State Board communicated legislative positions and recommendations on a regular basis, primarily through Porter, Tilles, and McKerr. However, these legislators were more critical of the importance of the SBE and such communication.

TABLE 31
LEGISLATORS' PERCEPTIONS OF THE IMPORTANCE OF THE SBE
IN FORMULATING AND WORKING FOR EDUCATION LEGISLATION (N=14)

Descriptor	Frequency of Response
Single most important participant	0
One of the most important participants	5
A participant of minor importance	6
Not important at all as a participant	3

The typical legislator comment was along the lines of "The SBE impresses some people I guess...others don't pay much attention...it depends on the audience." General consensus was voiced indicating that the "strength of the SBE is via the CSSO and SDE." But there was no lack of more harsh criticism either. Comments ranged from "they don't go beyond passing resolutions" to "what they know about education you could put in your fingernail" and "we ought to just do away with them."

The last of these comments related to open displeasure with having a State Board directly elected on a partisan ballot. The more critical legislators seemed to believe that Board members were more concerned about politics than education. Serious concern was expressed that the Board constituted a policy-making body largely unaccountable to the Governor, the legislature, or even the political party conventions which nominated them. More than a few legislators supported the feeling expressed by the Executive branch that a gubernatorially appointed Board would be more "accountable" to state government.

Board members themselves believe that they maintain contact with the Governor's office on pressing educational issues, but recognize that, as with legislators, such contact is almost exclusively limited to staff channels. In this sense, it was clear that Porter "carried" the Board almost singlehandedly regarding such relationships. (As noted previously, the Governor's ex officio non-voting seat on the SBE is delegated to staff man Jim Phelps.)

Strained relationships between the Governor and the Board were manifested by the Governor's desire to abolish the "politically motivated body" and have the CSSO appointed as Secretary of Education in the Executive Cabinet. Since Porter's emergence as an effective SBE leader, however, relationships have improved to the point that the Governor reportedly would be satisfied with an appointed board of distinguished citizens "above politics." Thus, in the harsh words of some, a "political partisan body full of bickering political hacks" might be replaced with a Board more responsive to the Executive.

The relationship between the State Board and major educational interest groups appeared to be marked by substantial but perhaps sporadic activity, although there is serious question as to how effective and satisfying the relationship was in the policy-making process. As far as Board members are concerned communication from such interest groups is not lacking quantitatively.

TABLE 32
SBE MEMBERS' PERCEPTIONS OF HOW OFTEN THEY ARE CONTACTED BY THE MAJOR EDUCATIONAL INTEREST GROUPS

Group	Frequency of Contact Described As: Often	Sometimes	Rarely	Never
Michigan Education Assn.	5	1		
Michigan Federation of Teachers	4	1	1	
Michigan Association of School Administrators	5	1		
Michigan Association of School Boards	5	1		

These responses were largely consistent with educational interest group leader perceptions indicating that such contact with the Board occurred fairly often. MEA, for example, employed a staff person to work full time on SDE-SBE relations.

But serious doubts were raised as to how effective such contacts were, or if any particular interest group was more effective than others in dealing with the SBE. Board members almost exclusively backed rapidly away from the question of which group was most influential. Some interest group leaders, on the other hand, tried to make a case that if anybody had an "edge" with the SBE, it was their group. But these attempts fell far short of convincing.

Indeed, other EIG leader comments belied any claim to working well with the SBE directly: "It's John's Board...he guides them to the decision he wants...so we try to work through him;" "We work with the Board if we get a deaf ear from (CSSO-SDE)"; "We at least try to have a representative at each (SBE) meeting." Hence, to the extent that CSSO-EIG relationships might break down, so too would relationships with the Board. The SBE probably recognized this to be the case since it took steps in 1972 to insure that EIGs had an opportunity to offer "input." (One SBE member cracked: "We were getting Hell kicked out of us publicly. We had to do something to try to include them in.")

In conclusion, then, the relationships between the state board of education and other components of the state educational policy making system were largely foreshadowed by and based upon the person and office of State Superintendent John Porter. The Board's relationship with the CSSO appeared to be very good. But, as a cynic would say, "why shouldn't it be? They're following his lead." The "followership" of the Board was not quite strong enough for anyone to legitimately criticize the Board as a "rubber stamp," but at the same time nearly everyone--including some Board members--fully recognized who was carrying the Board's banner along with the SDE.

The Educational Interest Groups

The four major educational interest groups having the most substantial impact of state educational policy-making were the: Michigan Education Association (MEA); Michigan Association of School Administrators (MASA); Michigan Association of School Boards (MASB); and the Michigan Federation of Teachers (MFT). While other education groups (such as elementary and secondary principals) and education-related groups (such as PTA) were involved in the policy-making scene, the four major ones as identified above constituted not only the largest in membership, staff, and budget, but also appeared to be the most influential over time.

The MEA, affiliated with the National Education Association and enrolling approximately eighty thousand educators, was by far the largest of these groups. With an annual budget in the range of $8 million, and a staff of approximately 125 including several lobbyists, the MEA enjoyed an advantage of clearly superior resources. The Michigan Association of School Boards, by contrast, enrolled roughly 560 boards of education, aggregated dues in the range of $300,000 and fielded a staff of eight. These kinds of data for all four groups compare as follows.

TABLE 33
MICHIGAN EDUCATIONAL INTEREST
GROUP PROFILE OF SELECTED DATA

Group	Approximate Membership	Approximate Dues Income	Approximate Staff Size
		(in thousands)	
MEA	78,805	7,880	127
MASB	560	277	8
MASA	783	77	3
MFT	18,000	432	5

As a further interesting organizational characteristic of these groups, it should be noted that only the two teacher groups (MEA and MFT) had formed

political action arms for the purpose of aggregating and allocating resources to political office-seekers "friendly to education." The MEA apparently tapped large amounts through its dues-related "negative check-off" of $5 per member. The MFT appeared to coordinate its efforts through the AFL-CIO's political arm (COPE), but data representative of MFT participation were unavailable.

However simplistic these organizational characteristics may appear to be, they nevertheless serve to illustrate the diversity and fragmentation which for years have been typical of Michigan educational politics in general, and educational interest groups in particular.

TABLE 34
EIG LEADER PERCEPTION OF AGREEMENT
AND UNISON AMONG THE GROUPS ON LEGISLATIVE ISSUES (N=8)

Descriptor	Frequency of Response
On nearly all legislative issues	0
On most legislative issues	0
On some legislative issues	3
On almost no legislative issues	5

The group leader respondents themselves indicated that agreement and unison existed on almost no legislative issues. Teacher tenure, certification, accountability, and welfare issues of the collective bargaining type were all factors seen as driving wedges in any attempt to build unity or cohesion among groups. (The collective bargaining law of the mid-sixties--in many respects pacesetting in the nation at the time--sealed the labor-management split among the groups.) Legislators similarly viewed the interest groups as largely fragmented, although to a lesser extent than as perceived by the groups themselves.

TABLE 35
LEGISLATORS' PERCEPTIONS OF HOW OFTEN EIGS ACT IN UNISON AND SPEAK WITH ONE VOICE ON LEGISLATIVE ISSUES (N=14)

Descriptor	Frequency of Response
On nearly all legislative issues	0
On most legislative issues	1
On some legislative issues	9
On almost no legislative issues	4

There was some evidence to indicate that the groups took largely similar positions on a few issues--typically finance-related ones. The groups were together in their opposition to "parochiaid" and have agreed in principle on some finance legislation over the years. But on questions of strategy, and especially on "Issue C", finance, the groups have typically been unable to close ranks and present a united front. As on "C", the more frequent pattern has been for the MEA to take a strong position and let the other groups go their own way.

In terms of rivalry between the groups themselves, apart from the very real questions of educational policy differences, the groups have polarized into "labor" and "management" factions, each with its own subset of rivalry. The MEA and MFT, on the one hand, have been adversaries historically out of the same cloth as their parent affiliates. Early in the competition for teacher memberships the two groups argued over matters such as whether administrators should belong, whether strikes were ethical, and generally who was more "militant" than whom. But in the last decade, the differences between the groups--other than size--have largely boiled down to AFL-CIO versus NEA affiliation. An uneasy truce has settled over the two employee groups even to the extent that they have at least been able to communicate if not work cooperatively on an ad hoc basis in the fact of the common "management enemy."

The management groups, on the other hand, have had their own problems. The superintendents (MASA) and school board members (MASB) were close enough to being of equal strength as to facilitate building at least an image of unity. The smaller and newer administrative groups (elementary and secondary principals respectively) faced the difficult choice of whether to remain weak by trying to "go it alone" or to opt for group strength and be "swallowed up" by the superintendents. The compromise, called The Congress of School Administrators which includes Professors of Educational Administration, served to coalesce these groups into a loose confederacy strong enough to "get along with" the MASB.

In composite, then, these rivalries are sufficient if not complete explanations for the degree of fragmentation evident in school politics at least among the educational interest groups. That such inter- and intra-group rivalry existed relates directly to such questions as the nature of CSSO-EIG relationships.

From the view of the State Department, for example, attempts <u>have</u> been made to "get the groups together" to try to reach consensus on "something." On a <u>personal</u> level, several respondents indicated that "there is a good working relationship among lobbyists" representing the groups, but that the organizations themselves are so diverse that little agreement or cooperation stands up over time. But at least part of the fragmentation and rather poor CSSO-EIG relationship has been based upon "tactics" as well as diversity of principles.

In a previous section, it was noted that the interest groups almost uniformly resented what they construed to be "token" consultation in light of the limited time the groups were sometimes given to respond. There were some opinions expressed that "things may get better" especially since the

State Board had recently adopted a more overt posture in permitting if not soliciting interest group input. But the fact remains that the groups did not hold the CSSO-SDE in particularly high regard as a friendly or even attentive ear.

Interest group attitudes towards the State Board of Education were not much different. While some groups indicated that they did attempt to influence the Board, the impression given was that such linkages were not highly valued. This appeared to be true for several reasons.

First, the groups generally agreed that it was "John's board" and hence, to the extent that a "communications gap" existed with the CSSO, EIG-SBE relations were impaired. Second, although some group staff time was assigned and expended in the SBE's direction, the tendency was to view the board as a poor third or fourth to legislative and executive policy-making arenas. And finally, there was some evidence that at least the MEA and perhaps the MFT as well, believed the way to have impact on the Board was to participate in the initial election of board candidates. To this extent, the teacher groups relied on their "political action" disposition and capability before the fact as well as limited "lobbying" of the board members following their election.

A far clearer picture is that of the relative relationships between the educational interest groups and the legislature. The group leaders perceived their organizations to be among the top groups in influence with the legislature.

TABLE 36
EIG LEADER PERCEPTION OF HOW
INFLUENTIAL THE MAJOR EDUCATION
ORGANIZATIONS ARE WITH THE LEGISLATURE (N=8)

Descriptor	Frequency of Response
The top groups	1
Among the top groups	6
Among the less important groups	1
Not at all influential	0

However immodest such a composite perception might appear to be, the views of the legislators themselves indicated that the group leaders underestimated themselves.

TABLE 37
LEGISLATORS' PERCEPTIONS OF
THE EDUCATION LOBBY (N=15)

Descriptor	Frequency of Response
The top groups	7
Among the top groups	5
Among the less important groups	3
Not at all influential	0

Both legislators and group leaders, as well as other actors in the state policy system gave a variety of reasons why the respective groups were influential and which groups were most effective in their lobbying. However, the "big picture" appeared to be as follows:

1.) MEA - Due primarily to large numbers, ample monetary resources, and a large staff, the MEA was considered to be the most influential of the four groups. Legislators themselves ranked the MEA first, with other groups not as close as other respondents believed. Although MEA leaders contended "we're not set up to wine and dine" and emphasized the "information" style of lobbying, legislators and others perceived MEA as a well-oiled, politically active, aggressive organization. There was little doubt among the respondents as to which group ranked first. Second, third, and fourth place depended on "who you talked to."

2.) MASA - The school administrators may have been the next most effective group (legislators tended to say so) probably through the use of respected local superintendents as informal lobbyists. The MASA, by virtue of very limited monetary resources, tended to maximize

communications by telephone and mail to supplement personal contacts. The credibility and prestige of local members in the role of superintendent constituted MASA's largest asset.

3.) MASB - Wherever the school board ranked in influence, its strength was similar to the nature of MASA--respected local members. In MASB's own words, "we're not set up to wine and dine" (perhaps having read the same book as MEA) so the organization tried to capitalize on providing information and using local volunteers. The MASB added its version of local strength, however, tending to emphasize that as elected officials, they might be more representative of and responsive to "the people."

4.) MFT - Some respondents ranked the Federation as second only to MEA in legislative influence. In fact, given the right issue at the right time, the MFT probably would be more effective. For the MFT, unlike the other groups, tended more to focus its energies on a smaller audience. Since the Federation's strength was concentrated in the Greater Detroit area, the organization stressed its influence with urban, Democratic, and labor-oriented legislators. MFT strength within those parameters appeared to be a "given." But across issues, overtime, and considering the breadth of the state, the MFT probably ranked fourth among the groups. (This is consistent with legislator rankings as well.)

Relationships between the Governor's office and the interest groups generally can be characterized as good. The Governor is seen by the groups as having a sincere interest in education, and placing real emphasis on resolution of pressing school finance inequities primarily in distribution of wealth. In addition to finance (pressing to get "Issue C" on the ballot),

the Governor has also pushed reorganization of intermediate and non K-12 districts, accountability, and "reform" of education generally. Hence, the group leaders perceive the executive branch as relatively "open" to hearing their concerns. All of the group leaders, with the possible exception of the MFT, felt assured they could secure an audience with the Governor on important issues.

Based upon the evidence and opinions from most respondents, however, equality of access was not synonomous with equality of influence. There appeared little question that the MEA owned any "inside tract" that might exist with the Governor. First, MEA-Governor relations appeared to have been good over time, dating at least as far back as the Governor's days as a state senator (an MEA endorsed office-holder). When the Governor and MEA had a serious difference over "parochiaid," the other education groups also opposed the Governor. And when the Governor decided to attempt an initiative petition drive to put "C" on the ballot, the MEA was there to "rescue" those efforts. This latter relationship has provided the MEA with whatever contemporary "edge" it holds. In support of the Governor's initiative the MEA collected more than a half million signatures and spent more than a quarter million dollars. The rest of the EIG community, by contrast, was so badly divided as to be of little help, or else got into the act so late as to constitute only paper endorsement. (MFT was a weak supporter, MASB an unenthusiastic opponent.)

Hence it is not surprising that the Governor would make particular mention of the MEA as a "source of ideas and advice." Nor is it surprising that the Governor would look to MEA as a strong lobbying group in dealing with a legislature rather evenly balanced on the basis of partisan seats and perhaps even leaning slightly away from the Governor philosophically.

The Legislature

The role of the legislature in Michigan's state educational policy-making system is influenced by a number of relatively complex and interrelated

factors perhaps lending some instability to any attempt at long range analysis. While one can attempt to "freeze-frame" relationships at a given point in time, as has been done here, there is historical evidence to suggest that the pattern of educational decision-making seems to be the annual "garden variety" with little continuity over the years. The fragmented nature of educational politics in Michigan, if anything, seems to have produced a less predictable process than may exist in a number of other states.

During the time frame of this study, focusing on 1972, the Michigan legislature was nearly equally divided along partisan lines. In the House, fifty-eight Democrats and fifty-two Republicans served as state representatives, while in the "upper chamber" the seats were evenly balanced between nineteen Democratic and nineteen Republican Senators. This balance of party loyalties probably contributed as much as anything to the bipartisan treatment of educational issues.

In addition, there appears to have been a tradition of some legislators with strong educational backgrounds and/or interests being looked to as effective spokesmen on key school policy issues before the legislative branch. In the House, for example, both the Speaker and Minority Leader were viewed in this light. With regard to Committee activity and influence, there appeared to be a shift in perceived importance away from the education committees and towards the "money" committees (finance/appropriations). This was due, at least in part, to the fact that a number of legislators and non-legislators alike were critical of the procedures of the House Education Committee.

The relationships of the legislators to other components of the state policy making system were reflected in part by responses to the question of who/which group "provides the most useful information regarding public schools" and issues. By their responses, legislators were apparently inclined to look

primarily to the state department, local school district officials and two of the educational interest groups--MEA and MASB. Little reference was made to either the Governor's office or state board of education as sources of public school information.

TABLE 38
LEGISLATORS' PERCEPTIONS OF
INDIVIDUALS/GROUPS GENERALLY PROVIDING
THE MOST USEFUL INFORMATION ABOUT PUBLIC SCHOOLS
(N=15)

Sources Mentioned	Frequency of Mention*
MEA	7
MASB	7
SDE	6
Local Districts	5
Citizens' Research Council	4
MASA	4
Other Legislators	3

The following were mentioned once respectively: Education Commission of the States, Universities, MFT, Governor's Office, Legislative Staff, and State Board of Education.

*Responses totalled more than fifteen because of respondents giving multiple answers.

These responses seemed to support assessments derived from other sources that:

The State Department, and the CSSO specifically, stressed close working relationships with the legislature via education and "money" committees and with the House and Senate leadership. The SDE-CSSO have been rather successful in bills they have sponsored, perhaps due to concerted efforts to "read" legislative concerns in advance. Little SDE-CSSO activity in this regard was viewed as partisan or pressure-oriented. While some legislators appeared critical of the quality of information from the SDE, the over-riding perception was a more favorable one. Hence, the SDE was looked to for information and advice.

The legislature looked to, and relied upon, local school district representatives/"lobbyists" for information and advice regarding the impact of proposed or needed school legislation. This is not surprising, and in fact is easily understood, in light of the rebirth of concern for "local control" triggered by the school busing controversy in Michigan. Legislators seemed particularly conscious of their role as locally-elected officials, and many expressed a desire to be responsive to local school district representatives.

The legislature did look to at least two educational interest groups for their input--MEA and MASB. The former constituted the largest and most powerful, while the latter may have been perceived as made up of "locally elected officials." But the historical fragmentation of the EIGs in Michigan appeared to have taken its toll of interest group influence in the legislature. The SDE was perceived to be as important as any one of the groups--perhaps even as important as the groups taken together in light of their lack of cohesion.

The legislature did not look to the executive branch for substantial information, advice, and leadership on educational issues, <u>even though</u> the Governor was viewed as being "pro-education." In this regard, legislators almost unanimously answered "yes" to the question "Has the Governor emphasized education...?" in his legislative program. The typical view was that while the Governor <u>has</u> taken strong positions on educational issues, he has been "out on a limb several times and had it sawed off!" Respondents frequently mentioned "parochiaid" as an example where the Governor was virtually alone, especially among the educational community. But, another factor dominating legislature-Governor relationships explained why/how the spectrum of political ideology impacted on educational policy-making relationships. As Republicans go, Milliken was viewed by at least some as rather liberal. More than a few respondents alluded to "the difficulty he (Milliken) has with his own

party." Whether the Governor is "a conservative Democrat and doesn't know it," as one respondent commented, the fact remained that communication and cooperation between the Governor and opposition party leaders (especially the Speaker of the House) was viewed as rather good.

The following Table illustrates that when major schools finance bills are being considered in the legislature, basic conflicts evidently can be predicted with a degree of regularity. None of the fifteen respondents said that basic conflicts did not develop; all respondents answered that basic conflicts did arise in the six categories identified. A great amount of conflict arose, when major school finance bills were considered, between spokesmen for the cities and those for suburbs or rural areas, and also between spokesmen for wealthy school districts and those for poor school districts. Several of those who were interviewed mentioned the relationship between the two general categories. Detroit spokesmen, in other words, could be relied upon to press for more money for urban schools, while spokesmen for the wealthier suburban schools would be in opposition to these demands. Either a great or moderate degree of conflict could be expected between Liberals and Conservatives and between the political parties. Moderate conflict, in the opinion of those legislators interviewed, could be expected between the Governor's supporters and opponents, or between business and labor. Only a few legislators believed that a slight degree of conflict might arise when major school finance legislation was being considered. Curiously, as many legislators said that a slight degree of conflict would arise between the political parties, as the number who felt that the conflict could be either great or moderate. A possible reason for this response, given the traditional intense political party differences in Michigan, would be that in school finance legislation, conflict takes its form more often through Liberals and Conserva-

tives, city spokesmen versus suburban or rural spokesmen, or spokesmen from wealthy versus poor school districts.

TABLE 39
LEGISLATORS' PERCEPTIONS OF BASIC CONFLICTS ARISING IN THE STATE LEGISLATURE WHEN MAJOR SCHOOL FINANCE BILLS ARE CONSIDERED
(N=15)

Type of Conflict	Importance				No Response	Total Responses
	Great	Moderate	Slight	None		
Between Political Parties	5	5	5	0	0	15
Between the Governor's Supporters and the Governor's opponents	3	8	3	0	1	15
Between Spokesmen for the Cities and Those for Suburbs or Rural Areas	10	5	0	0	0	15
Between Liberals and Conservatives	7	5	3	0	0	15
Between Business Spokesmen and Labor Spokesmen	4	9	2	0	0	15
Between Spokesmen for Wealthy School Districts and those for Poor School Districts	11	3	1	0	0	15

The Governor

Michigan's Governor William Milliken views himself, and is viewed by others as an "education" Governor, sincerely concerned with the critical issues facing the schools of The Wolverine State. Even before Serrano the Governor had expressed his concern for, and commitment to, school finance reform. On this point, Milliken has been particularly critical of a finance plan which was in his words, "shot full of inequities."

If the Governor believes he has stressed reform of school finance and educational programs, he also believes--as do others--that he has been "hurt

politically" by the positions he has taken. The Governor's position favoring parochiaid, for example, particularly alienated the education interest groups in general, and the MEA in particular. But these "political losses" have apparently not dulled the Governor's personal commitment to change. In the words of one legislator, "no one questions his (the Governor's) sincerity."

Milliken believes he has been bi-partisan in approach, attempting to work with leaders on both sides of the aisle. Some have even suggested that the Governor has had more luck with Democrats than Republicans in the legislature. But, the Governor is perhaps more accurately described as "an independent Governor" than as "a party leader." Given the relative even balance along party lines in both houses, the bi-partisan approach, while no doubt sincere, may have been also the most politically realistic.

The bi-partisan approach notwithstanding, the Governor was unable to succeed with the legislature over the most pressing school finance issue of 1972--that of placing issues C and/or D on the general election ballot. Whether the Governor "reversed himself several times" as some legislators charged, the fact was that no agreement could be reached in the legislature to put these issues before the people separately or in combination. In the absence of a legislative decision, the Governor proceeded to launch his own initiative to put Issue C on the ballot, and as we have noted earlier, probably would have failed to do so had not MEA "come to his rescue" with several hundred thousand petition signatures as well as dollars. While the issue subsequently failed at the ballot box, the MEA-Governor cleavage from "parochiaid" days was at least bridged, if not healed. Hence, among interest groups, the MEA was clearly favored with an "inside track" with the Governor.

Also close to Milliken, though for different reasons, the State Department via John Porter has been viewed as an important source of ideas and advice

to the executive. Porter and Milliken reportedly have at least similar views on questions of accountability and school district reorganization leading to more centralization. State Superintendent Porter has given the same careful attention and cultivation to CSSO-Governor relationships as to CSSO-legislature linkages. The net result has been that the Governor and his staff at least view SDE information as "usually" meeting their needs. Here again, the SBE has been largely fore-shadowed by its effective CSSO.

Hence, the role of the Governor in state educational policy-making may be characterized by firm leadership which has influenced, and been influenced by, relatively strong Governor-CSSO and Governor-MEA linkages. Positive Governor-legislature experiences and relationships have been harder to come by, and only after much bipartisan hard work and compromise. The balance of the educational interest groups as well as the State Board have been remotely involved by comparison.

SECTION VII

INTERPRETATION AND CONCLUSIONS

The process of educational governance in Michigan, as manifested in state policy making for the public elementary and secondary schools, has been presented in this report. Within the limitations of a selected group of educational policy issue areas and the primarily cross-sectional view as of 1972-1973, an examination was undertaken of the process of state educational policy making. Policy making is an on-going process which cannot be described and analyzed without the benefit of a larger understanding of a state and its governmental system. Thus, the socioeconomic and political contexts of Michigan were reviewed and were followed by a consideration of some important structural factors for education and state government. Attention was given to three recent, major educational policy issue areas in the state, namely school finance, school desegregation, and the education assessment program. The policy roles and relationships involving the State Superintendent and State Department of Education, the State Board of Education, the educational interest groups, the state legislature, and the Governor were described and analyzed according to interview data. Finally, some broader interpretive comments and conclusions about educational policy making in Michigan will be made.

Major Themes

In Michigan it would seem that enacting educational policy is a process which may be even more complex than found in other states. In Michigan the educational interest groups have been and continue to operate in a fragmented fashion. The Michigan state legislature has demonstrated a partisanship with the political parties frequently taking a firm stand based on ideological viewpoints. Some of the Michigan governors have been able to achieve major accomplishments

but they usually do so only after great effort and perseverance. The educational problems facing the state's leaders are as great in magnitude as are the problems confronting educational and state government executives in other states. But in Michigan, in particular, the difficulties emanating from many educational problems are increased by other factors such as the desegregation problems in Detroit and its spillover to the metropolitan area; basic conflicts involving state and local interests, the political parties, the interest groups, and the State Board of Education; and an economy severely hurt by the nation's economic troubles of the early 1970s. Each of the four major themes will be reviewed in greater detail.

The preeminent aspect emerging from past accounts of state educational politics in the Wolverine State has been the fragmented nature of the interest group structure and the inability of these organizations to join forces in presenting a common front in the resolution of educational issues. A legacy of interest group fragmentation was reaffirmed in interviews which were conducted in the state. The policy issue of school finance has been an issue of broad state saliency and its resolution transcended the bounds of the educational interest groups and the state's educational leaders. While MEA worked hard to assist the Governor in placing Proposals C and D on the November 1972 ballot, by no means did the educational interest groups work in unity in school finance reform. The inequities in the Strayer-Haig deductible millage formula, ever increasing educational costs, and voter defeat of property tax levies, combined with calls for a more basic reform by such authorities as the Thomas Report and the current Governor heralded the fact that reform in school finance would be a long term process and would involve the dual issues of allocation of revenues and property tax reform. Each of the inte-est groups, in general agreement, worked in the development of their own proposals for achieving reform.

In another area, the education assessment program, the classroom teachers initially worked with the State Department of Education in developing suitable tests but later, the MEA publicaly opposed the standardized testing procedures which increasingly came to be seen as harmful to students' welfare. An analysis of interviews in Michigan showed that the responses of educational interest group leaders tended to be distributed broadly, and theinterest group leaders did not speak in unity on nearly any subject. Five of the eight interest group leaders who were interviewed saw "almost no" agreement among interest groups on legislative issues. Legislators, themselves, responded that the interest groups were generally fragmented. In Michigan, therefore, the polyarchical life style of educational interest group behavior has endured. At the broadest level, the interest group bifurcation has been based on a split between labor and management. More specifically, each of the interest groups has gone its own way in working with its constituency, coming into agreement with other groups only on an ad hoc basis, and by its actions remaining a separate and distinct entity.

Another major theme in Michigan was the intense partisanship of the political parties. As the history of the interest groups has demonstrated fragmentation, so has Michigan's recent political history shown political partisanship affecting virtually every phase of political and governmental life in the state. The era of GOP domination in the state ended in 1932, and since that time legislative and executive control has seesawed back and forth between Democrats and Republicans. Neither legislative reapportionment nor multiple terms by Governors Williams, Romney, and now William Milliken have significantly moved the legislature away from its partisan composition and process. If anything, legislative partisanship has moved Republican Governor Milliken somewhat to the left in an effort to attract bipartisan support for his programs.

Whether William Milliken may be closer politically to the Democrats than to the Republicans is a moot point, but the fact remains that particularly in the issues of school finance and property tax reform, the Governor's commitment to basic reform, his broad appeal to disparate groups and individuals whose bipartisan support was necessary, and his perseverance spanning a number of years enabled Senate Bill 110 to pass in 1973. Gubernatorial leadership in Michigan has demanded great skill by a sensitive politican, an experienced chief administrator, and a deft executive. Few of Michigan's governors since 1932, excepting G. Mennan Williams and George Romney, have been able to negotiate the difficult path of executive leadership in a manner which has enabled the state to fully meet its problems. William Milliken's success will be judged by history but his efforts at school finance and property tax reform were unmistakable. While not unscarred by past political defeats, notably a very narrow margin of victory in 1970 and the defeat of parochiaid, Governor Milliken has established himself as committed to education, independent in style, and sincere in his willingness to work for more effective government.

The challenges confronting William Milliken when he assumed office, many of which remain, lead to a consideration of the fourth major theme in Michigan. The problems facing Michigan's education and governmental leaders are immense. The nation's most devasting urban riot; continuing dilemmas with the Detroit schools involving decentralization, protracted teacher strikes, and racial bitterness; individuals and groups steeped in the legacy of labor-management conflict; legal action by local educators against the State Department of Education; and a landmark desegregation court case combine to present great challenges to leadership. While Governor Milliken's and State Superintendent Porter's abilities in administrative leadership may lead to a more successful period than Michigan has experienced recently, the barriers to enacting sound

and equitable policies are great. It would appear that William Milliken and John Porter have emerged in their respective areas at a period when strong leadership was needed. Their initial successes are encouraging for the future of state governmental and educational policies in Michigan. Their continued leadership is necessary if the state is to live up to its potential for innovative policies and effecting needed services to local citizens.

Policy Issues in Retrospect

Two of the three educational policy issue areas selected for examination by this study illustrated the leadership roles of the Governor and State Superintendent for Public Instruction. In school finance, William Milliken was sensitive to pressures for reform prior to his taking office as Governor. Undoubtedly, his experience as State Senator and as George Romney's Lieutenant Governor, permitted his early assessment of the state's problems and areas in which he would move for new policies. Although the Governor attempted to create a bipartisan approach to school finance early in his first term, the issue took its usual course in Michigan by becoming enmeshed in partisan politics. By building a broad-based support for school finance reform and by continued perseverance to considering alternatives for new policy, the ultimate success of of Senate Bill 110 was achieved.

State Superintendent John Porter, like his gubernatorial counterpart, was no stranger to Michigan education and politics. Experienced in the State Department of Education and capitalizing on pressures for reform, State Superintendent Porter identified the broad area of accountability and the specific problem of assessment as a major concern. Much of the pressure for reform had been recognized by Ira Polley, predecessor to John Porter, but it was State Superintendent Porter who took assessment directly to the public as one of his

major concerns. The assessment issue is a fitting example of an instance where a State Superintendent provided the leadership to the State Board of Education in their approval of a policy position. The assessment issue has been one where the State Superintendent demonstrated his unwillingness to be subservient to the interest of the statewide educational organizations but rather, he has pressed for implementation of the program as an important achievement of his office.

The area of school desegregation has taken a different route. As an issue of major social and educational significance, school desegregation is to be resolved only by considerable intervention by the courts, as the Michigan case clearly demonstrates. Although the State Board of Education and state legislature do not take issue with the Constitutional provision to provide education without discrimination, the state's educational and governmental leaders are wont to recognize the consequences of exercising too much leadership in an area involving public emotion and anger. Thus, wherever possible the issue of school desegregation has remained a Detroit dilemma where sharp lines of residential segregation and racial bitterness have acted against its possible resolution. The state's lawmakers and education officials are awaiting the decision of the U.S. Supreme Court before further actions are taken.

Conclusions

Michigan entered the 1970s at a time when general economic difficulties of the nation bore down heavily on the state's economy as the automobile center of the nation. A clearly inequitable system of school finance, taxpayer dissatisfaction with an increasingly burdensome property tax, and schools which were becoming more racially segregated made the period ripe for new leadership. The bipartisan appeal of Governor Milliken to a state legislature characterized by

politically divided upper and lower houses, and the enactment of major new school finance legislation opened the door for a more equitable distribution of state revenue to local schools. The independent leadership of the State Superintendent for Public Instruction at a period when latent public dissatisfaction with public education was becoming visible have augured well for the possible future success of John Porter as the state's chief state school officer. The fragmented nature of the educational interest groups shows now signs of imminent change. With independent and forceful leadership, however, the state of Michigan can continue on the road to recovering public confidence in its system of education and state government.